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Digital directions—Carving out windows in the global SVOD era **p74**



Kidscreen

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OCTOBER 2015



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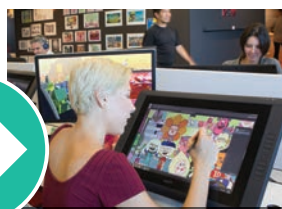
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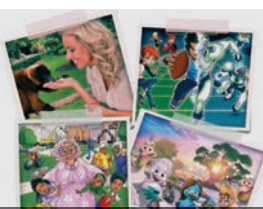
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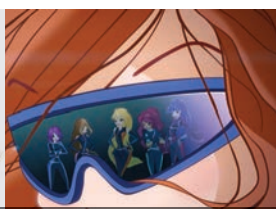
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Cover Our cover features an ad for Nelvana's new CGI-animated comedy series *ZhuZhu Pets*, while our inside editorial cover sports an image from upcoming Universal Pictures/Illumination Entertainment feature film *The Secret Life of Pets*.

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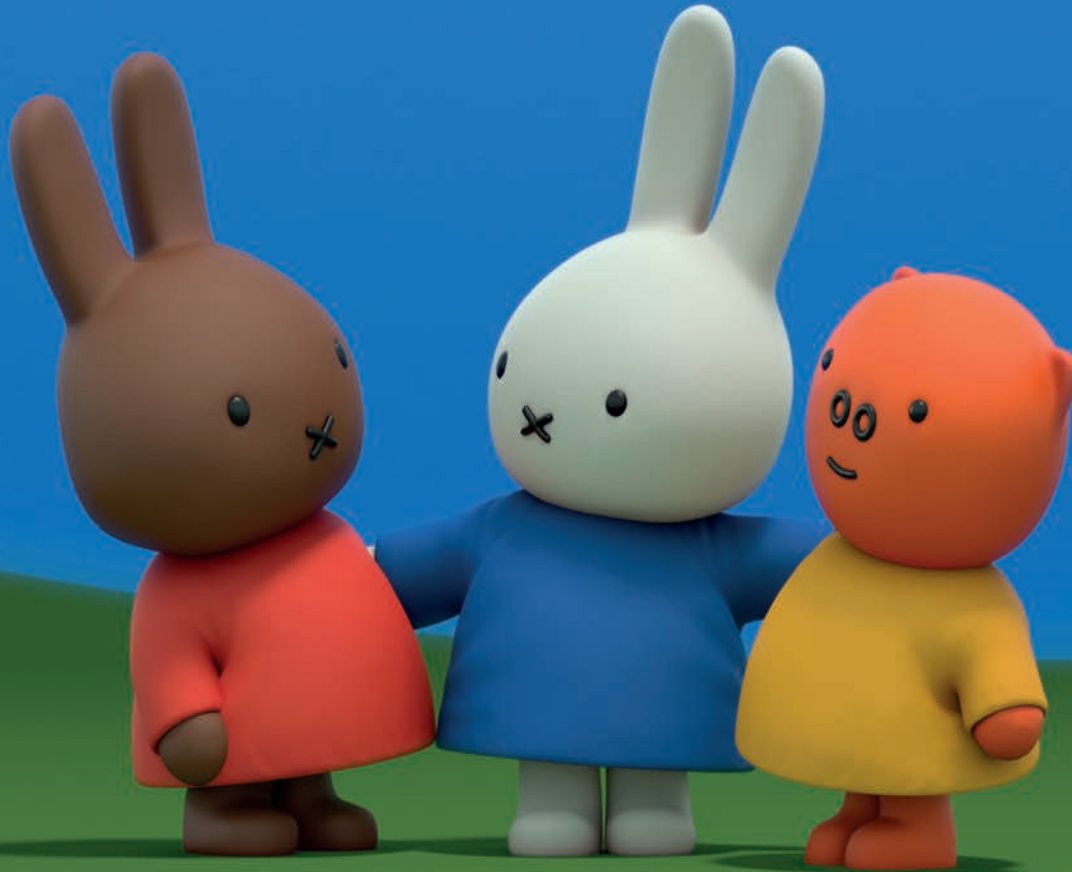
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Making connections

According to reports from analysts and metrics firms coming out of the States, commercial cable kids broadcasters are not having a great year—to say the least. Nielsen live-plus-seven ratings show that from July 2014 to June 2015, Viacom channels, and primarily Nick, were down 21% among two to 11s, while Disney dropped by 10% with the demo. Only Cartoon Network showed gains (17%) for the period. At the same time, The NPD Group is reporting that toy sales as of June were up by 6.5%, and tracking to grow by 6.2% overall this year. Trust me. I'm going somewhere with this.



"We can't conceive of any solution that would rekindle interest of kids and teens to watch linear TV," wrote media analyst Todd Juenger, in a well-reported research note for his firm Bernstein in August. He is certainly overstating the case, as other recent research from firms like PwC has shown that kids are still watching live TV more than they are streaming content. But it is almost impossible to sugar coat the transition taking place right now within the US-kids audience. *Kidscreen* has noted for a decade that kids have been migrating from a linear to an on-demand, content-anywhere world, and now we're seeing that fact reflected in the hard numbers these nets use to attract advertisers and drive revenue.

Only when you look at impressions across all platforms/devices upon which the big three's programs are available do you see that kids, in particular the US, are still pretty invested in their programming and brands. Of course, there doesn't seem to be any viable metric that currently captures all that. Reportedly, US commercial broadcasters like Viacom, Disney and Turner have banded together to form The Coalition for Innovative Media Measurement to close the ratings gap. In the meantime, this is where those toy sales come in.

Not only are US toy sales on track to grow substantially more than they have in 10 years, all but one of the super-categories (i.e. youth electronics, dolls, action figures) are reporting increases of 4% or more (all figures, NPD). Hot licenses seem to be propelling the sales spike, and one in particular—PAW Patrol—appears to have helped turn the entire preschool category around. In 2014, the category reported the largest dollar declines of the 11 categories that are measured, and this year it is witnessing the second-highest dollar gains, with 8% growth. Spin Master's PAW Patrol is a TV-driven property, so preschoolers must be watching the Nickelodeon series en masse and falling in love. It's also a ratings hit, but if analysts are to be believed, it takes more than that these days to achieve this level of CP success. And while I know there's not quite a direct line to be drawn, it may be worth a network's while to pay even closer attention to these types of connections as another form of measurement. After all, there's arguably no better evidence of engagement than a child who won't go anywhere without his or her Chase stuffie.

Cheers,
Lana

kidscreen

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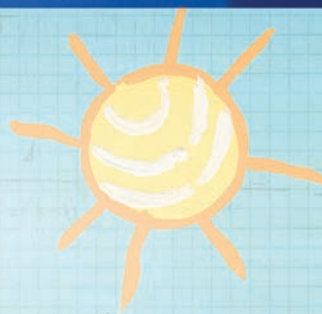
Kids 4-8. Source: Nielsen NPOWER, STD 9/22/2014 - 3/29/2015. Total Day L+7 national kids multi-weekly programs. PBS GAA% and select competitive cable networks AA%(Cartoon Network, Disney Channel, Disney Jr., Discovery Family Channel (The HUB), Nickelodeon, Nick Jr., Nick Toons, Disney XD, and Sprout). Ranking excludes programs with <4 telecasts or <15 minute duration.. Artwork © 2015 9 Story Media Group/Kratt Brothers Company. Wild Kratts is a Kratt Brothers Company/9 Story Media Group production. Wild Kratts™ and associated characters, trademarks, and design elements are owned by Kratt Brothers Company Ltd. Licensed by 9 Story Media Group. All rights reserved.

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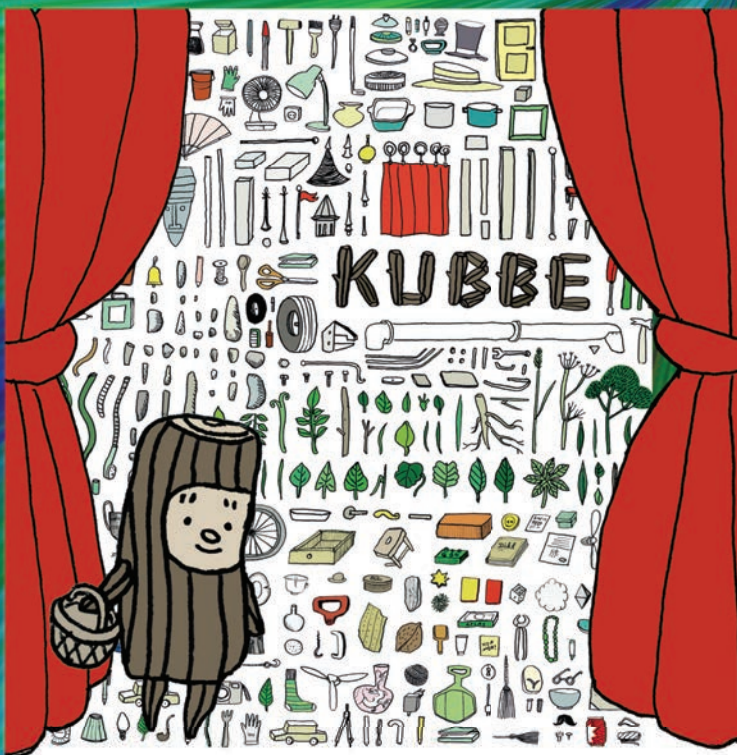
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The List

Five things on our radar this month



1 The Force to be reckoned with

Across the galaxy, fans eagerly waited outside local toy stores to usher in Force Friday on September 4—marking the first time new *Star Wars: The Force Awakens* merch appeared on retail shelves. Sales from the single-day global marketing event were brisk, and over the next three months the Disney Consumer Products-conceived program is expected to generate US\$1 billion and US\$5 billion at US and global retail, respectively. With the US toy industry pacing to grow by 6.2% this year, according to The NPD Group—and retailers already struggling to keep up with demand for Millennium Falcon drones and BB-8 droids—2015 is tracking to be one of the most lucrative for the biz in decades. Not too shabby, considering annual US toy industry sales have typically only risen annually—but more often dropped—by a few percent over the past 10 years.



2 Playing catch-up

When Apple recently announced that updates to Apple TV will include a motion-sensitive remote control with voice navigation, universal search, and the ability to run third-party apps, it was a step up, but not Earth-shattering news. Roku, for example, already offers games and features voice control. With its plans for a streaming TV service and original content creation still circling in the rumor mill, Apple may see developers balk at investing, at least until its TV platform truly stands out among its many competitors.



3 Kidsnets chase metrics

Broadcasters including Disney, Viacom and NBCUniversal have launched The Coalition for Innovative Media Measurement, a research group now attempting to track kids' video consumption habits. The group hopes to restore the faith of uneasy advertisers and ensure the success of their own multi-platform projects by measuring second-by-second viewing on TV, VOD, DVR playback and OTT video streaming. Nielsen's been taking a similar tack (much to Netflix's chagrin), but perhaps it's not giving the answers broadcasters want to hear.



4 Asia awaits

Streaming giant Netflix marked its foray into Asia in early September, starting with Japan. Less than a week later, it announced that launches for the service in South Korea, Singapore, Hong Kong and Taiwan are earmarked for early 2016. Ever-growing mobile proliferation and internet access in the region make for opportune timing, but breaking ground in an already saturated IPTV/SVOD market could present Netflix's largest growth obstacle yet.



5 New social norms

New lines are being drawn for linear TV. Social and mobile media has been influencing the decisions of kids and TV nets alike, but a recent string of commissions from Nickelodeon indicate an ardent effort to explore life outside of TV in order to fend off non-linear competition. From the creator of *iCarly* comes mobile-themed *Game Shakers*, which makes apps created in the series almost immediately available to kids in real life, and 20 eps of social media-inspired mockumentary series *Pinky Malinky* will bow in 2016.

➔ To keep up with the news as it happens, check out Kidscreen.com daily.

Bobby & Bill

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K.C. Undercover kicked off the launch week of Disney Channel Canada

Shaking it up

After major programming changes and an executive realignment, Corus Entertainment aims to be the kids category leader in Canada

To say it's been a fast and furious kind of year for Toronto, Canada-based Corus Entertainment may be an understatement. The first big change occurred in March when former head of Corus Kids Doug Murphy succeeded John Casaday as president and CEO of the media conglomerate. Then came Corus's landmark licensing deal in April for the Canadian English- and French-language rights to Disney Channel's content, along with the streaming and ad-supported VOD rights for certain titles in the Mouse House's programming portfolio.

Not long after the announcement, while Corus was working on the launch strategy for Disney Channel Canada, the company saw its VP of Kids & Family programming and original productions, Jocelyn Hamilton, depart after 25 years to helm eOne Television, Canada as president. (At press time, Corus was still conducting a search for her replacement.)

And in late August, some serious exec shuffling took place. Among the moves, VP of Corus Kids Colin Bohm was promoted to EVP and head of Corus Kids; Maria Hale was upped to EVP of television, and perhaps the biggest change saw former Nelvana EVP and current CTO Scott Dyer add Nelvana president and EVP to his title. Nelvana Enterprises co-heads Andrew Kerr and Antoine Erligmann, and Nelvana Studios VP and head Irene Weibel retained their positions. "One of the big parts of Corus Kids' strategy going forward is expanding our content ownership, and our principle vehicle of that is the Nelvana business," says Bohm. "[Dyer's appointment] is about bolstering what is already a strong executive team."

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On the channel side, Corus pulled the plug on Teletoon Retro, which went off air on September 1, the same day Disney Channel Canada launched. And on September 3, Corus-owned Cartoon Network Canada expanded its distribution to more than five million subscribers in Canada after pickups from cablecos Rogers, Shaw and Shaw Direct, replacing Teletoon Retro on the dial. As part of the move, Cartoon Network Canada became the exclusive home to CN originals *Adventure Time*, *Clarence*, *Steven Universe* and *Teen Titans Go!*. Corus-owned Teletoon, meanwhile, switched out the CN original shows that largely made up its evening schedule for new weeknight programming including *Inspector Gadget* (DHX Media), *ALVINNN!!!* and *the Chipmunks* (Bagdasarian Productions), Australian series *Get Ace* and new episodes of *Lego Ninjago*. In addition, content sourced from the new Disney acquisition, including *Ultimate Spider-Man* and *Avengers Assemble*, moved to Teletoon's new superhero block.

According to Bohm, all of the changes will help position Corus Entertainment for growth and bolster its already comprehensive lineup of kids and family offerings. "The biggest opportunity is for Corus to be the kids category leader in Canada, and adding Disney Channel is an important piece of the puzzle," he says. "Our affiliates appreciate our new commitment and investment in world-class brands and programming to support and turn their business in today's evolving landscape."

And with the addition of Disney, Bohm expects a significant increase in advertising opportunities. "From a reach perspective, when you add Disney programming into our complement of existing services, the scale is an incredible opportunity among moms and kids," he says. "We'll now be reaching 90% of moms with kids under the age of 12 in Canada on a monthly basis."

Addressing the Cartoon Network and Teletoon changes, Bohm says some of the decisions were made based on age-appropriate content. "First, we've repositioned Teletoon to take it a little bit younger," he notes. "So, as we looked at the portfolio lineup, some of the edgier stuff that is on Cartoon Network doesn't really feel like it belongs on a five to eight channel. And second, we wanted to create that really authentic Cartoon Network experience [on CN Canada]."

As for Corus's YTV and Nickelodeon Canada content, Bohm says the addition of Disney Channel will have no effect on how they are scheduled. "Our Nick content won't change at all, other than we'll continue to see more great new Nickelodeon shows coming soon," he says.

Looking ahead, Bohm says Corus is confident in its new direction, but definitely feels the weight of responsibility that comes with carrying the Disney brand. "In addition to all of the challenges and logistics of launching a channel in fairly short order, when you look at the bigger picture, there is a big responsibility in managing the Disney Channel brand. We have a fan base with very high expectations." —Jeremy Dickson





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Portfolio positions for growth

Toronto's Portfolio Entertainment unveils a new state-of-the-art production studio



Portfolio Animation aims to be a creator-driven hub for its existing and emerging talent

The next phase of Toronto, Canada-based Portfolio Entertainment's multi-faceted expansion plan that began in 2014 is officially open for business. Covering 9,000 square feet and located in the creative hub of the city's King West district, Portfolio Animation is the company's newly launched state-of-the-art studio and corporate office space.

Portfolio veteran and SVP of production Julie Stall will helm the studio and work directly with new creative head Dave Beatty (*Johnny Test*), who is also senior producer and showrunner for the new studio's first original animated kids series *Freaktown*. Additional Portfolio kids properties *The Cat in the Hat Knows a Lot About That!* and *Doki*, along with *Freaktown*, currently comprise the core of the studio's pipeline.

With its new talent and full animation services (including concept development, design, storyboarding, animatic editing and a new cloud-based storage system) under one roof, Portfolio expects the studio will attract new partners, strengthen its already thriving global distribution business and improve the quality, value and efficiency of its projects.

The company's growth and diversification plan initially kicked into gear last year with the installation of a new senior management team. "The decision to expand was made be-

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tween 18 months and two years ago," says Lisa Olfman, co-founder and co-CEO of Portfolio. "From that time period on, we assembled a group of what we consider to be top talent from a variety of entertainment sectors. To ramp up, we tripled our size across our development, animation and production divisions."

New hires include former Teletoon Canada business exec Trent Locke, who joined in March 2014 as Portfolio's COO and VP of finance, and Liliana Vogt, who came over from 9 Story Media Group last October to fill Portfolio's newly created SVP of content position.

For Olfman's longtime business partner, co-founder and co-CEO Joy Rosen, the time was right for the company to enhance its operations. "There is a lot of disruption happening in our industry right now, but we look at any type of change as an opportunity to stay ahead of the curve," she says. "Our new studio will give us the opportunity to have more creative control, the ability to attract more emerging talent, and the leverage to continue our work as a respected talent incubator. With our years of experience building the business, we feel it's a great time to ratchet up and grow in-house."

Portfolio is currently at work transitioning its core group of shows into the new pipeline.

The Cat in the Hat Knows a Lot About That!, for example, is now fully in-house. Two full seasons (60 eps) plus one holiday special have been produced, and work is underway on three one-hour specials for PBS KIDS and Treehouse.

For *Doki*, production is continuing on season three, and pre-production is being completed at Portfolio on *Freaktown*.

According to Rosen, the new studio has seven shows in development, three of which are live-action tween/teen properties—a new format and demographic for the company.

"Liliana's really helped us to expand and has brought artists to us that we might not have had the opportunity to work with before," she notes.

While the move to diversify has gone smoothly, Olfman contends that the biggest challenge has been gathering talent. "It's a wonderful time for the animation business in Canada, and there is a tremendous amount of work across the country, but being able to find the talent that will help continue to improve our quality is difficult," she says.

With the new studio in place, Portfolio is now meeting with co-producers and global networks to bring more projects under its collaborative roof. —Jeremy Dickson



Portfolio Entertainment's CEOs and co-founders Lisa Olfman (left) and Joy Rosen (right)



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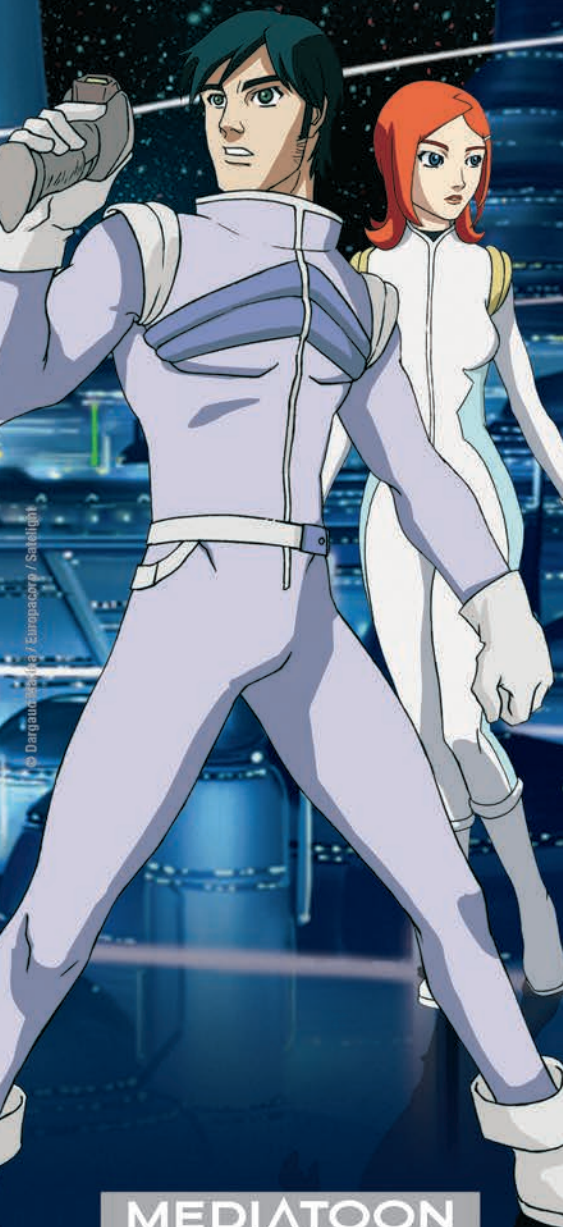
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On a Roll...

L.A.-based Rollman Entertainment marks five years and three Emmy noms as a developer and manager of brands

Who Since launching in 2010 under the guidance and leadership of president and CEO Eric Rollman, content creation and brand management company Rollman Entertainment has created, produced and delivered more than 400 episodes of kids TV (with five shows broadcast in the US) and garnered three Emmy nominations to boot.

Rollman's decision to create his own company came after serving six-plus years as the president of Marvel Animation and a long executive stint with Saban. "I had a lot of experience working with significant IP and brands, and as much experience on the corporate side, so it seemed like the right time to start an independent company," says Rollman.

The company set out with the goal to manage brands in new and interesting ways while also developing original content. "We're also unique because we're not focused on one particular genre," says Rollman. "I consider us to be demographically- and genre-agnostic."

He also doesn't position his company as a production company, per se, because the services it offers are much broader. "Production is a service we provide when it makes sense for the partner and project, but it's not our core business of brand management."

Diversity rules Rollman's first project materialized around 2011 when his company partnered with Indian animation studio DQ Entertainment to executive produce the first-ever 3D animated feature film based on *The Jungle Book*. According to Rollman, a US distribution deal is close to being finalized and P&A is secured. "We have a beautiful script and artwork, so we're hoping to put it into production this year," he says.

Not long after the film project began, Nickelodeon reached out with a development project tied to the National Football League—animated series *NFL Rush Zone*. Rollman says it was the catalyst for setting up a studio in L.A. "We produced 44 eps, were nominated for an Emmy, and it continues to run on NickToons and is now rolling out internationally," he says.

In a bid for more diversity, Rollman then partnered with Zaya Toonz on a new faith-based kids IP called *Iesodo* (Japanese for the way of Jesus). "The brand is an allegory for the stories and characters in the New Testament. We brought it to market through a series of seven DVDs and continue to make more," says Rollman.

The property, through its American distributor Capital Christian Distribution, has digital deals with Netflix, iTunes and Amazon, a TV deal with Trinity Broadcasting Network (TBN), and licensing deals with the Christian retail tier and Walmart. Ireland's Monster Entertainment, meanwhile, is currently handling *Iesodo*'s international television distribution.

Additional projects for Rollman include the January 2015 Lionsgate animated feature *Tyler Perry's Madea's Tough Love*, as well as two hit docu-reality shows, *Sea Rescue* and *The Wildlife Docs*, made with SeaWorld Parks & Entertainment.

Rollman is also working with SeaWorld to find L&M partners in the US for international animated hit *The Jungle Bunch* from TAT Productions.

What's next Rollman's upcoming projects include a hybrid series based on the US Army's first toy line, *Lil' Troops*, and an extreme sports series called *Team XYZ*.

In terms of the future, Rollman says, "The biggest opportunity with any independent is the changing landscape of the world we work in. The coming of age of YouTube celebrities and programming has made us take a closer look at how our collective experience can bring value to the new generation of content creators, as well as the audiences who embrace them." —Jeremy Dickson



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The dormant days of summer need not apply to the French licensing industry. In late August, CPLG tapped former Disney Consumer Products exec **Virginie Kleinclaus-Renard** as MD of CPLG France. Kleinclaus-Renard spent the past 20 years working in L&M at the House of Mouse in roles including director of infant, fashion and home for France. She replaces longtime CPLG MD **Marina Narishkin [A]**, who joins TF1 Enterprises as director of TF1 Licenses. She brings with her 15 years of industry experience from CPLG, where she managed licensing programs for hit brands such as Minions, Dora the Explorer and Teletubbies. Narishkin fills the void left by the departure of the deputy CEO of TF1 Enterprises, Hubert Taieb, who just finished a 26-year run with the company.

In other CP news, DC Entertainment chief **Diane Nelson**, also president and CCO of Warner Bros. Interactive Entertainment, expands her purview to become the new head of Warner Bros. Consumer Products. Current WBCP president **Brad Globe** is preparing to step down next spring. Industry vet **Globe** has served as WBCP president since 2005 and will work with Nelson in the coming months to ensure a smooth management transition, and Nelson will announce **Globe's** successor in 2016.

Meanwhile, Disney Television Animation has made a number of executive appointments, including promoting **Eric Coleman [B]** to SVP of original programming and GM. In addition, **Jonathan Schneider** has been upped

to VP of strategy from his most recent position as executive director of development, and **Shane Prigmore** is now VP of creative affairs after serving as co-executive producer and creative director on the studio's upcoming *Tangled* TV series. Two new faces over at the Mouse House are former DreamWorks Animation feature film production executive **Bonnie Lemon**, who is now Disney TVA's VP of production, and new VP of development **Aaron Simpson** comes to Disney from Mondo Media, where he served as head of development. Disney-owned Maker Studios, meanwhile, has parted ways with its chief content officer, **Erin McPherson**, who oversaw the MCN's more than 270 shows that are in various stages of development.

Over at Sesame Workshop, preschool TV vet **Kay Wilson Stallings** joins the company as SVP of content development, where she oversees pilot production of all original content, globally. Wilson Stallings is also tasked with exploring new production models and partnerships to develop new programs, processes and talent for the creative group. Most recently SVP of production and development for Nickelodeon Preschool, Wilson Stallings served 16 years at the Viacom-owned network, and her appointment marks Sesame's fourth significant exec hire from the Nickelodeon ranks. Former Viacom vet **Tanya Haider** also joins the Workshop in her new role as EVP of strategy, research

and ventures, where she leads planning efforts surrounding content and market research, as well as oversees the organization's partnerships with venture companies, with a focus on social impact. Her résumé includes senior positions in strategy and business development in the Viacom Kids and Family Group.

In Canadian TV news, Temple Street Productions has tapped former Tricon Film & Television exec **Jon Rutherford** to lead its new distribution arm. Rutherford is now president of distribution at Temple Street, and he is responsible for running the division with a focus on expanding content distribution globally and across all platforms.

Angry Birds creator Rovio Entertainment is making changes of its own. With rapid internal growth belying consumer demand for the franchise, the Finnish developer and publisher has laid off 260 employees in a corporate restructuring. But the company is saying hello to new faces, including **Tuomo Korpinen**, who is now president of Rovio Animation Company and Blue Bird Distribution Company. The former head of international TV sales at DreamWorks Animation will develop and implement a long-term strategic plan to expand Rovio's presence in media and entertainment. Rovio also promoted marketing exec **Anurag Sachdeva** to country director for India and South Asia, where he looks to consolidate the company's presence in the region by bolstering its organizational capabilities and partnerships.



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Jim Fielding has come a long way since working the gas dock at the local yacht club at age 13. After catching the retail bug, Gap, Disney Stores and Claire's came calling. Now at DreamWorks Animation/AwesomenessTV, Fielding is ecstatic for the company's future in consumer products.

Positive disruption

The gig Global head of consumer products and retail at DreamWorks Animation and AwesomenessTV, overseeing the studio's licensing and franchise management businesses and all retail efforts for the tween- and teen-targeting multiplatform media company.

Consumer-driven Despite graduating from Indiana University with a degree in political science and a plan to become an international lawyer, Fielding's early retail experience and love of entertainment and animation helped take the Toledo, Ohio native down a different career path.

He soon discovered his true calling upon entering a retail training program with the Dayton-Hudson Corporation (now Target). In fact, one of his early influencers was a store manager there named Steve Tyre.

"He saw something in me and encouraged me to think big," says Fielding, who obliged, and went on to be recruited by Gap in 1989, where he served for eight years. "I worked for Gap's former CEO Mickey Drexler in the '80s and '90s, and it was like getting an MBA in retail," says Fielding. "I ran stores, but then got into product development and merchandising. I was traveling around the world inspecting factories and finding new ones to make product. This was the heyday of The Gap."

According to Fielding, the talent pool ran deep. "I was surrounded by so many smart people," he notes. "I shared an office with Maureen Chiquet, who is now the CEO of Chanel. It was such a weird time. There were so many important retail leaders who got a lot of their formative training at Gap."

Fielding adds that he also spent a lot of time with Gap's founding family, the Fishers, who taught him about corporate culture and giving back.

"They are a very philanthropic family. My parents were very charitable, too, but in different ways. So much of my morals and ethics come from them," he says.

Higher ranks Before being recruited by Disney in 2001, Fielding faced his biggest career hurdle when the company he was working for at the time, The J. Peterman Company (yes, the real J. Peterman Company) went bankrupt.

"It was the darkest point of my career. You feel like a failure, but I learned a lot," he says.

Once at Disney, Fielding credits Andy Mooney, former chairman of Disney Consumer Products, for showing him the way. "I started in cataloging, then went to stores and then to pure licensing, which I had never done before," he concedes. "But Andy gave me a shot."

Fielding also pinpoints a few stages in his career that he calls "moments of truth or clarity."

"Becoming CEO of Claire's was a pivotal moment, as was the move to AwesomenessTV and DreamWorks. My target customers at Claire's were tween and teen girls around the world—the same group that has completely changed its media consumption behavior, driven by companies like AwesomenessTV. I feel like that pivotal moment was disrupt or be disrupted," he says.

New dreams Fielding acknowledges DreamWorks is ready to move on from its more recent challenges and is primed for a rejuvenation.

"We have definitely gone through a lot of change at DreamWorks, but I feel that we've stabilized and are focused on the future. There are a lot of great stories and characters coming that consumers will want to extend through consumer products and experiences," he says.

"We're very excited about *Kung Fu Panda 3* and *Trolls*, and we have so much coming from TV, like our newly launched *Dinotrux* series on Netflix. Not only do I like the show from a business standpoint, but it's just really enjoyable." —Jeremy Dickson



DreamWorks is expecting streaming and retail success for its Netflix original kids series *Dinotrux*

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Nina Hahn

SVP of production and development, Nickelodeon International

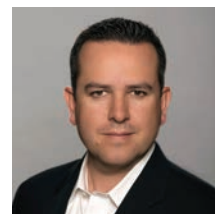
I'm obsessed with my **Pez Collection**, which I started when I was young, and it's still growing at upwards of 750 Pezzies! Each one is my favorite. Trucks, angels, monsters, Ninja Turtles—I have them all!



George Vorkas

President, Colorforms

I'm obsessed with **anything space**—where each planet is in the sky at any one time, what each NASA mission is doing, and what future missions are planned. I was nutty the week that New Horizons flew by Pluto!



Federico San Martin

VP of global consumer products, The Jim Henson Company

Toys have been a huge part of my life since I was a kid. While my tastes have matured to big-boy toys like **guitars, bicycles and motorcycles**, I love seeing the evolution of some of my childhood favorites, like **Hot Wheels and Lego**.

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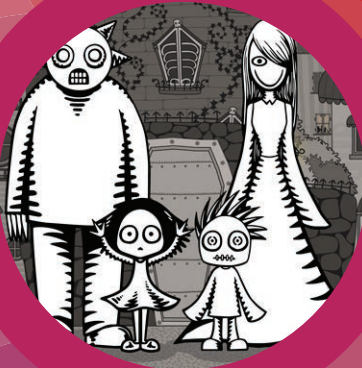


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Adventure Time and Doc McStuffins have been two of Hulu's most popular titles

Hulu amps up kids biz

Armed with a new ad-free option, a crop of new premium kids acquisitions and expanded distribution, the SVOD service is taking aim at its US competitors

BY JEREMY DICKSON

After a long period of speculation, Hulu finally pulled the trigger September 1 to give viewers an ad-free option, offering a US\$11.99 monthly commercial-free subscription. (An ad-supported US\$7.99 per month sub is also available.) The new subscription model, combined with Hulu's thriving acquisitions business for premium kids content, could give the online streaming service the shot in the arm it needs to boost its US subscriber base of nine million, and stay competitive with rivals like Netflix and Amazon.

According to Hulu CEO Mike Hopkins, the timing was right to give customers what they want. "Many of our

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customers have asked us for a commercial-free option, so we are excited to offer just that," he says. "Providing more choice for consumers is fundamental to the Hulu experience. In addition to an array of choices in content and devices, our customers can now choose to watch with or without commercials."

In anticipation of attracting new subscribers, Hulu has been intensifying its acquisitions activity on the kids side of its business from within the US, as well as outside for its ad-free kids section. (The service won't reveal how much it spends on kids content, but according to RBC Capital Markets estimates, Hulu could spend up to US\$1.5 billion on overall acquisitions this year.)

Hulu Kids' senior content acquisition manager Andrew Thomas says the company is bringing in the highest-profile brands it can to make an investment in Hulu's future as a subscription service. "We believe the adage that content is king, and we want to get the best content we can as quickly as possible," he says. "Our deals over the past nine months or so have been closely aligned with our network partners. Having a network label attached to the content is very meaningful for us and is a big part of our growth in the near term. Most of the acquisitions have been animation-focused as it's a signature genre for us."

Animation-driven

Among its more significant deals this year, Hulu secured the exclusive Stateside SVOD rights to Disney Junior's hit animated series *Doc McStuffins* and *Bunnytown*, and the non-exclusive rights to Disney Junior original *Handy Manny* in March.

The pick-ups marked the first time Disney Junior content was made available on Hulu and they were quickly followed by deals with Cartoon Network for the exclusive streaming rights to past and current seasons of series including *The Amazing World of Gumball*, *Steven Universe*, *Over the Garden Wall*, *Clarence*, *Ben 10*, *Adventure Time* and *Regular Show*, plus upcoming series.

Additional exclusive rights were recently acquired from Endemol Shine International for the first two seasons of *Mr. Bean: The Animated Series*, and ABC Australia for all 104 eps of The Wiggles' preschool series *Ready, Steady, Wiggle*. It made its US debut on the service earlier this year.

Hulu also features content from the Jim Henson Family TV library (*Doozers*, *Fraggle Rock*), PBS KIDS (*Daniel Tiger's Neighborhood*) and 9 Story Media Group (*Get Ace*, *Nerds and Monsters*), as well as Spanish-language kids programming, shows for toddlers, classic toons, kids movies and, like Amazon, hit Nickelodeon shows such as *SpongeBob SquarePants* and *Teenage Mutant Ninja Turtles*.



Dr. Dimensionpants from Canada's DHX Media has been a quality pick-up for Hulu

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"We've also acquired some great content from independent producers like Canada's DHX Media (*Dr. Dimensionpants*), so we've been covering all our bases and taking leaps on shows that are relatively unknown in the US," says Thomas.

As Hulu doesn't divulge ratings information, the first page of its algorithm-driven "most popular" kids shows (at press time) included *Adventure Time*, *Doc McStuffins*, *SpongeBob*, *Ready, Steady, Wiggle* and four other Cartoon Network shows.

"It's representational of our audience's expectations," notes Thomas. "It reflects that mom and dad, who like watching *Bob's Burgers* and *Family Guy*, wouldn't mind watching *Regular Show* or *Adventure Time* with their kids in the afternoon."

TV-like experience

In a bid to attract more co-viewing, Hulu made headlines in August when it struck a multi-year deal with premium cable network Epix to bring blockbuster films like *The Hunger Games* and *Transformers: Age of Extinction* to its service. (Epix previously had an agreement with Netflix.)

And in following the growth of tween engagement online, it also recently launched a teen genre section. "We know that the audience is there and we aim to bring compelling new content to them," Thomas says.

As it presses forward, he says Hulu will continue focusing on what it does well—securing current seasons of kids television series from big networks, deepening its well of previous seasons, offering unique marketing solutions and leveraging a dual revenue stream.

"The fact that we can bring TV favorites earlier, while they are very fresh and exciting to the audience is our strongest suit," contends Thomas. "And if there are ways to co-promote and be involved in the 360-degree wheel of kids brands, both in the consumer products space and the online and social branding space, we love to have those conversations with partners, too."

"The fact that we can bring TV favorites [to the service] earlier while they are very fresh and exciting to the audience is our strongest suit."

— Andrew Thomas, Hulu


For original programming, Thomas says Hulu will keep investing in its adult primetime slate, but is scoping out opportunities to expand into making original programming for kids. "We're always looking for ways to partner with premium studios and content makers," he says.

Last year, Hulu launched its first original kids series, *Doozers*, from The Jim Henson Company. But a renewal is yet to be announced, and Hulu won't reveal if it has any new funding earmarked for kids development.

According to Hopkins, Hulu's US\$750-million cash infusion from owners Disney, 20th Century Fox and Comcast has been used for acquisitions, marketing and staffing.

For now, Hulu's overall business is on the rise. The company revealed at its 2015 upfront that total streams increased by 77% in the first three months of the year, and that its subs have grown by 50% in the last year. Marketing investment, meanwhile, has grown by more than 150% since 2013, when the company reported revenues of US\$1 billion.

Hulu also increased its distribution footprint this year through a deal with Cablevision (its first with a cable or satellite provider) that will see the cable company make Hulu accessible on its set-top box.

"Our expansion will trickle down to our kids business in the next year," says Thomas. "We know that we have some work to do, but we believe we're well on our way." 



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Winx Club wows Netflix

How Rainbow is designing its new Winx Club spin-off specifically for on-demand viewing

When Italian prodco and animation studio Rainbow announced it was teaming up with Netflix to create an exclusive spin-off series for the streaming powerhouse called *Winx Club WOW: World of Winx*, it set the stage for an exciting new chapter in the global franchise's already notable 10-year history.

The new deal, which marks Rainbow's first original IP for a digital platform, will see the studio produce two 13 x 22-minute seasons featuring more serialized storylines to appeal to kids' appetites for VOD viewing. Both re-imagined seasons will be available in all Netflix territories, with season one arriving early next year, followed by the second season in fall 2016.

The series tags along as familiar Winx protagonist Bloom and her core group of fairies go on an undercover journey around the world in search of talented kids in art, sports, music and science. But before long, trouble arrives in the form of a dangerous mystery in need of solving.

Rainbow's VP of content, Cristiana Buzzelli, says the idea for the show came about thanks to the studio's existing relationship with the platform. "In the last couple of years, we started distributing our classic Winx Club library on Netflix and the results were extremely good," Buzzelli says. "So, considering Netflix was launching more original kids shows, we discussed the possibility of creating an original Winx series exclusively for the platform. It would be



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re-conceptualized for a digital audience, meaning more serialization and a target age slightly older (eight to 12) than our normal range for TV (four to eight)."

Additional changes will include a completely different artistic look and feel, brand-new characters, and more thrilling and mysterious plot twists not commonly found in the classic series. "The stories are also set on Earth this time and not in the magical dimension, where most of the classic series are based," adds Buzzelli.

As far as the collaboration goes, she says Rainbow has been very satisfied with the partnership, and it's been granted complete creative freedom. "Netflix knows that we know everything about the brand and understand how to make it successful. They supervise the production and double-check now and then to ensure the story meets their requirements of content consumption, which is typical of the platform," she says. "But they do not enter into the creative process on scripts, characters or plot lines. They leave these things up to the IP owner. It's a good match."

She notes that the biggest hurdle involved serializing the concept for binge-watching and making a show that would please longtime fans of the brand, as well as attract a new audience. "The challenge was to not lose all of the typical Winx Club elements that made the show so successful, while at the same time adding more mystery-based storytelling in a more urban, metropolitan setting," she says.

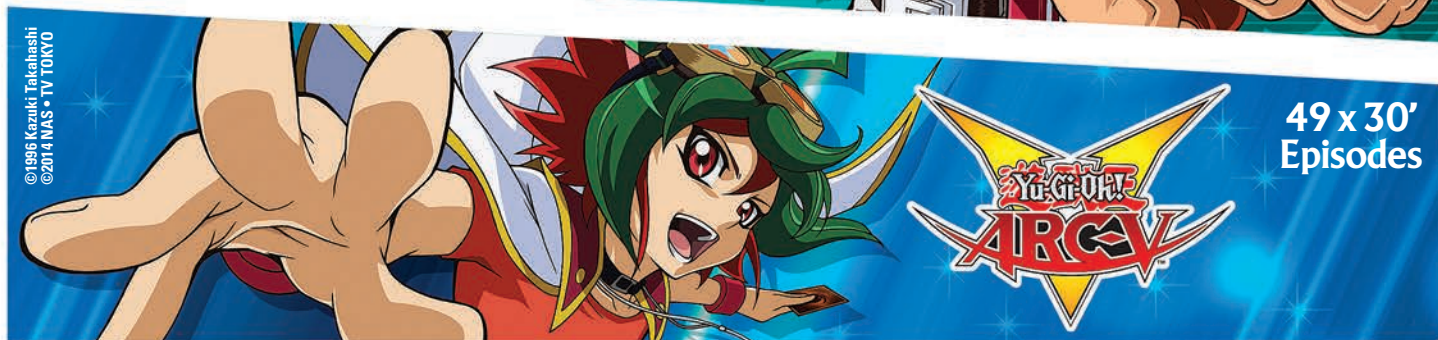
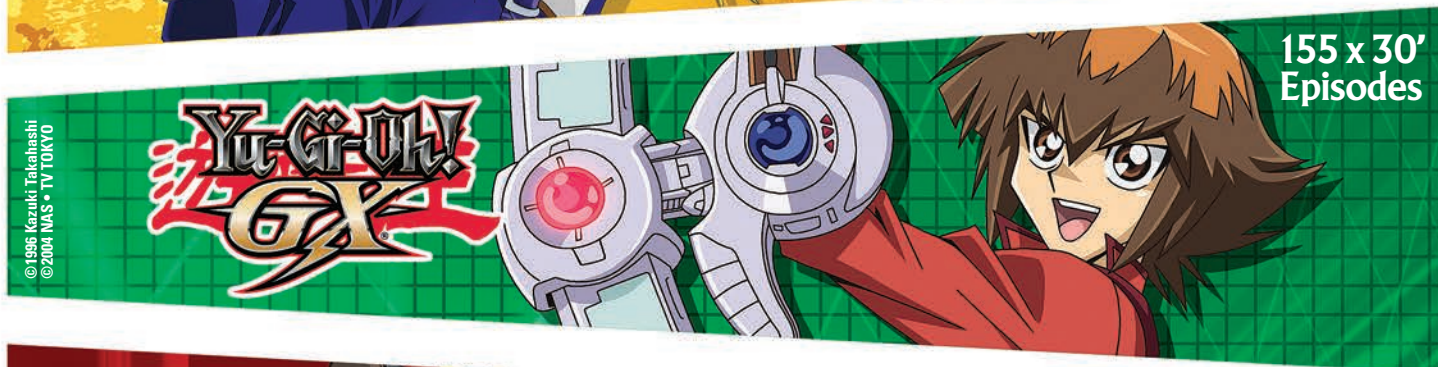
On the flip side, Buzzelli expects the deal with Netflix to open up a new market for Rainbow. "We are working with many digital platforms with the existing library, and the new series will open up partnering opportunities with completely new players in terms of production," she says. "Also, given how strong Netflix is in the English-speaking markets like the US, UK and Australia, this will definitely boost our presence in these territories, as well as in Japan, where Netflix has just launched and where Winx Club does not have a presence."

Rainbow's ultimate plan is to turn *Winx Club WOW: World of Winx* into a franchise, and Buzzelli says discussions are already underway about rolling out a licensing program for the new IP. —Jeremy Dickson



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TuningIn



Noddy, Toyland Detective will debut on France 5's preschool block Zouzous later this year

Adaptive programming

France Télévisions takes a creative cross-platform sandbox approach to boost business

The challenge The kids TV space in France remains ultra-competitive. Local nets including France Télévisions, TF1, M6 and Gulli, and major internationals like Disney, Nick and CN, continue to vie for broadcast dominance. But new digital platforms are raising the stakes even higher.

"In 2015, Netflix and YouTube are the main competitors for linear television, because children are turning to them in huge numbers. We have to push into the digital space to face this increasing competition," notes France Télévisions director of children-youth activities Tiphaine de Ragueneil.

To cope with the changing landscape of kids entertainment, the Paris-headquartered national pubcaster has been hard at work crafting a fresh kids strategy for its France 4 channel and launching a number of new digital initiatives.

"There was a big change last year. We launched a full daytime schedule dedicated to kids programs on France 4. It was new for us because we used to have kids blocks only during the mornings on France 3 with Ludo, and on France 5 with Zouzous," says de Ragueneil. "Our strategy was to develop our two main brands—Zouzous for preschoolers and Ludo for tweens and teens on France 4. At the same time, we have launched digital platforms dedicated to both brands, which are available on all digital devices, mobile, tablet, PC and connected TVs."

The programming For preschoolers, France 5's Zouzous offers content aimed to entertain and educate, but its series are not curriculum-based. Global phenomenon *Peppa Pig* is currently the top-rated program and brand, but France Télévisions has high hopes that the upcoming CGI-animated *Noddy* reboot will challenge *Peppa* for the top spot. From France-based Gaumont Animation, in association with DreamWorks Animation Television, *Noddy, Toyland Detective* finds the iconic character in a new role, helping kids learn how to investigate their world and make discoveries. The 52 x 11-minute series, expected to debut later this year, marks the first time in the IP's 61-year TV history that Noddy's car, Revs, will come alive and speak.

Kids brand Ludo, meanwhile, targets kids six to 10 on France 3, and skews even older on France 4 towards the eight to 12 demo.

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France 3's highest-rated Ludo series is currently Ubisoft's *Rabbids Invasion* (*Les Lapins Crétins Invasion*), while other popular shows include *The Little Prince* (Method Animation), *Oggy and the Cockroaches* (Xilam), *The Jungle Bunch* (TAT Productions) and the new *Peanuts* shorts (Normaal Animation). To date, *Peanuts* has been sold into more than 60 countries, including Canada (Radio Canada), Japan (TV Tokyo) and South Korea (Disney). "The shorts have helped bolster our co-view ratings, especially when they are linked to holiday occasions," says de Ragueneil.

France Télévisions' output deal with Warner Bros. also puts classic shows like *Scooby-Doo*, *Tom and Jerry* and *Looney Toons* into the mix.

"We are mostly looking for comedies with strong characters. In September, we will launch our *Inspector Gadget* acquisition [from DHX Media], and we think it will do very well. He's quite famous in France from the original series," says de Ragueneil.

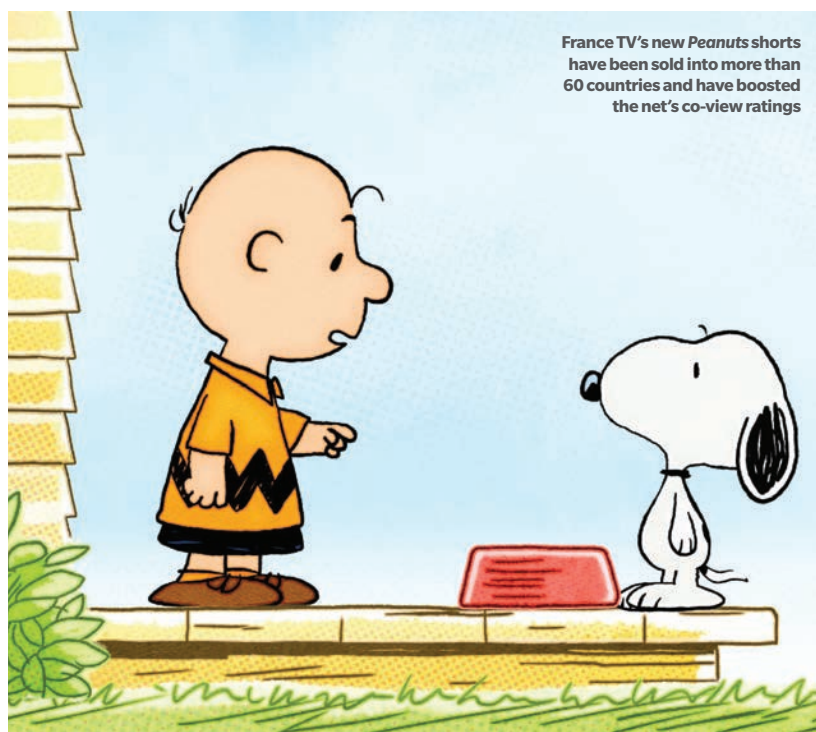
Looking at France 4, the channel's Ludo lineup includes many popular French co-productions such as *Titeuf* and *Oggy*. Animated series based on Marvel and DC Comics properties rate very well, too.

de Ragueneil says shows featuring slapstick humor for the three to sixes, and adaptations and classics for six- to eight-year-olds, would work well on the channel. It's also looking for, and developing, more hybrid series such as *The Seven Dwarfs and Me*, which is currently in production with Method Animation.

So far, according to de Ragueneil, the changes to France 4 have helped move its daytime audience share among kids closer to 10%, and ratings have doubled. France Télévisions currently reaches more than 9.4 million viewers ages four and up per week, and more than three million viewers in the four to 14 range, representing one in three French children watching FTV kids programming. Additionally, FTV invests €29 million (US\$32 million) annually in French original production and commissions, covering roughly 15 animated series.

Digital growth Staying close to digital-savvy kids, France Télévisions, in partnership with France TV Distribution, now has 20 YouTube channels, including ones for *Raving Rabbids* (more than three million total views), *Little Brown Bear* (10 million views per month) and one each for *Zouzous* and *Ludo*. Both launched earlier this year offering more than 1,500 free videos. The *Peanuts* shorts have also launched on apps, connected TVs, Xbox and online.

"Our business model is to share ad revenue with producers," says de Ragueneil. "The main opportunity is that we are providing a new sandbox to work with new creators to develop many different formats of shows." —Jeremy Dickson



France TV's new *Peanuts* shorts
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Just Launched

Zip zipping around the world



Oftentimes in kids TV, the silliest, simplest concepts are the most clever ones. That's certainly the case with *Zip Zip*, the newest original animated series from Paris-based producer-distributor GO-N Productions. Since debuting earlier this year on France 3 and Super RTL in Germany, the comedy created by GO-N co-founder Anne de Galard has been snapped up by a raft of European broadcasters, as well as Disney Channel in 100 countries.

Comedy matchmaking *Zip Zip* is a 52 x 13-minute 2D series for six- to 10-year-olds that follows a group of forest animals who trade in wilderness living for a more comfortable and luxurious existence in the city. Disguised as domestic pets, the animals move in with an unsuspecting suburban family and comedy ensues as they try to conceal their true identities.

During the development process, GO-N met American writer-producer Cynthia True (*The Fairly OddParents*, *The Mighty B!*) and brought her on board as a story editor and voice director.

"Although we weren't working with any American networks from the beginning, we decided we would include some North American writers," says GO-N co-founder and producer Eric Garnet.

With True's help, additional writers from the US who had worked on shows from *The Simpsons* to *SpongeBob* were hired, along with a crop of young writers from France who grew up watching a lot of US TV series.

"They matched well with Cynthia and the other US writers with their North American comedic sensibilities," says Garnet.

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Broadcast roll out As the concept evolved, GO-N secured a broadcast commission from France Télévisions and pre-sales soon followed to Super RTL and Disney Channel France.

The series was first introduced last October at MIP Junior where it was the second-most screened show at the event.

Its Easter premiere then drew strong ratings for Super RTL, and the show's debut on France 3 was also a success.

"Ratings were above average, which was good considering we're not a well-known existing brand. We were fortunate to have one of their best slots with *Raving Rabbits* and *Garfield*," says Garnet.

Shortly after its first premieres, *Zip Zip* launched on Canal+ in Poland, where each time it aired, the audience increased by 40%.

The series has also performed well on Disney in Asia, and according to Garnet, it was the second-highest-rated show after *Gravity Falls* on Disney Channel Australia this summer.

"Disney will air it next in Latin America this winter. It's not an easy audience because they are used to quite irreverent shows and maybe a slightly older sense of humor, so we'll see," says Garnet, adding that negotiations are currently underway with Disney to secure a US deal.

The biggest challenge, he notes, is getting the largest networks to bite on an original third-party series.

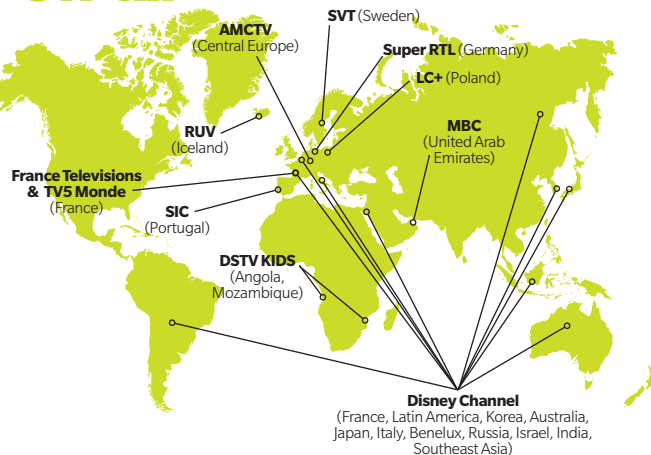
"They are mainly the ones launching original IP or are looking for famous existing brands or less expensive brands. Now, some broadcasters are interested in originals, but only if they can be part of it from the beginning," he says. "Hopefully, when they see that an original they've been supporting can succeed worldwide, they will want more."

Up next With TV sales moving swiftly, GO-N is currently working on a series of 15 short-form webisodes that will be made available for broadcasters' sites, a new *Zip Zip* website and an upcoming *Zip Zip* YouTube channel. GO-N is also developing interactive games with France Télévisions.

"The YouTube channel will be more for promotion at the moment because there are some territories that don't want a *Zip Zip* channel to compete with broadcast. For licensing, we will have to wait for a second season and more audience ratings to come in," says Garnet.

—Jeremy Dickson

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Banner sales for Universal's Minions are helping to accelerate the global growth of licensed toy revenues

Target markets

China, Brazil, Mexico, Russia
poised for growth in licensed toys

BY PATRICK CALLAN

Whether you're searching for toys at a big-box store in the US suburbs, or amongst the throngs of people at a busy shopping centre in Asia, chances are you will be able to find licensed Minions merch or Frozen's Elsa dolls.

In fact, licensed toy sales are up across the board in all 32 markets covered by London-based research firm Euromonitor International. Additionally, licensed playthings now claim 27% of all sales in the global toy market, according to Utku Tansel, Euromonitor head of toys and games.

With Americans spending nearly US\$5.9 billion at retail on licensed toys and games last year, the US has a comfortable lead over both Japan and the UK, which sit second and third, respectively (see chart, p.65). However, Tansel sees fourth-place China as the land of real opportunity.

With just 15% of toys sales coming from licensed goods, and the populous Asian country's per capita income forecasted to grow over the next 15 years, Tansel expects the situation will translate to more disposable income dollars being spent on licensed toys. (They tend to be pricier than their generic counterparts.) But that won't come without some challenges along the way.

"Licensed properties like Barbie, Cars and Marvel are still growing in China, but there are restrictions imposed by the government preventing these properties from developing fully," Tansel says. "There is a national policy imposed by the state administration of radio, film and television that requires TV channels to broadcast only domestic animated TV series during primetime."

Aside from China, Tansel also sees plenty of opportunity for licensed toys in the emerging Mexican and Brazilian

markets, where they already account for 30% of category sales. “When you look at Mexico and the top 10 properties in that country, you hardly see any local ones,” he says.

As with China, the combination of higher per capita income and a maturing market is expected deepen the penetration of licensed toy sales in both countries over the next 15 years. Other encouraging signs are found in Brazil, which ranks fifth worldwide and number one for licensed toys in Latin America, where 47.7 million people (23%) are under 14 years old. While in Mexico, 33.5 million people (27.6%) fit into that age bracket.

For many of the reasons already mentioned, Tansel says you can also add Russia—the seventh biggest market for licensed toy sales in 2014 with US\$768 million—to the list of which markets to explore when it comes to licensed property growth.

“Russia is an interesting market because they’ve still got their own properties from the Soviet era. Nostalgia plays an important role and parents are still opting for the properties they used to play with when they were children, whereas their kids are much more global as to what’s happening in terms of new properties,” Tansel explains.

While cultural nuances can be a barrier to entry, Tansel notes preschool properties and global brands, like many in Disney’s arsenal, tend to travel well. “When companies are thinking of entering a new market, they will need to consider what sorts of properties are out there, whether domestic or international, which ones are more pronounced, and then adjust their marketing strategy accordingly,” he says.

Looking at the overall licensing landscape, Tansel says the biggest challenge ahead will be to come up with new and inspiring properties. One quick look around and you’ll see that many entertainment companies, and especially retailers, have been hesitant when it comes to

investing in new and unproven properties. Instead, many have been banking on the plethora of classic reboots currently on the go.

“I congratulate Disney for its success with Frozen, which added a completely new property to the industry. Creating an evergreen brand—the holy grail of licensing—is difficult,” he says. “Hopefully we will see this from other companies, too, in years to come.”

One of the main reasons Disney was able to turn Frozen from a hit movie into a global cross-category brand almost overnight was the way it managed to harness the power and reach of social media platforms, Tansel adds.

“It is very important now for a property to get engaged with the public through social media. Disney used this very well in terms of creating its brand,” Tansel says. He adds that Frozen achieved its current stature largely through Disney’s social media strategy on channels like Facebook, Twitter and YouTube.

“It resonated and engaged with people—not only children, but adults as well—much more than other properties,” he says. “Do not underestimate the power of social media.” 

Sales of licensed toys & games 2014 (US\$ millions)	
US	5,867
Japan	1,679
UK	1,463
China	1,389
Brazil	1,055
France	949
Russia	768
Mexico	714
Germany	710
South Korea	668

Source: Euromonitor International



Disney leveraged social media to develop Frozen into a multi-billion-dollar franchise

On the lookout

Yo-Kai Watch ramps up to replicate US\$2-billion Japanese licensing success in North America, Europe

Based on the bestselling Nintendo 3DS video game that conquered the Japanese market, animated comedy-adventure TV series *Yo-Kai Watch* has arrived on North American shores. And licensees aren't wasting any time in scooping up a piece of the hit boy-skewing property from TV Tokyo, Level-5 and Dentsu, which has generated US\$2.26 billion in consumer products sales at retail in 20 months.

In fact, *Yo-Kai Watch*'s North American licensing agent, L.A.-based Evolution USA, just signed a raft of US and Canadian licensing partners that join previously announced program anchors—Hasbro (master toy, excluding Japan), VIZ Media (US manga rights) and Nintendo USA (worldwide 3DS video games).

Now part of the growing program are top-tier licensees like Accessory Innovations (bags, accessories), Isaac Morris (apparel), The Topps Company (confectionery), Cortina Leomil (footwear), Franco Manufacturing Co. (home furnishings), Panini America (stickers, photo cards), Bridge Direct (secondary toys) and Rubie's (costumes).

"Everybody that's involved with this franchise is really excited," says Travis Rutherford, president of licensing and retail at Evolution USA, which is on the cusp of signing a master publishing partner. Apparel/accessories are also expected to be key driving categories. "All the licensees have shown a high level of interest and sincerity in making this a big, big opportunity for the marketplace."

Yo-Kai Watch premiered on Japanese broadcaster TV Tokyo in January 2014 and is currently its top-ranked animated show for kids four to 12. It follows the adventures of a young boy who uses a magical watch to summon mischievous and mysterious Yo-Kai to help him solve everyday problems.

Yukari Hayakawa, CEO of Level-5 abby (the new North American joint-venture for the IP owner), says *Yo-Kai Watch* strikes the perfect balance between light-hearted comedy and depth of content. "*Yo-Kai Watch* is not your typical animated series, in the sense that it was first developed as a robust video game with an incredibly diverse story world of over 230 characters, all with back stories," she says. "As we developed the TV series, we already had this rich universe to tap."

Fresh off its US debut on October 5 on Disney XD (and rolling out on Canada's Teletoon on October 10), the series will be supported at retail on November 3 by VIZ Media's Perfect Square imprint *Yo-Kai Watch* manga comics. Nintendo's 3DS North American version of the game rolls out November 6. Hasbro's toy range, focused on a *Yo-Kai* watch and collectible medals, hits North American retailers in January 2016, before rolling out globally later in the year. Some soft goods could accompany the toys, and everything else should be on shelf



Licensees worldwide are vying for a stake in hit Japanese property *Yo-Kai Watch*

by back-to-school 2016, says Rutherford. Evolution is also in discussions for an SVOD partner and looking to fill in the party, social expressions, and food & beverage categories.

Meanwhile, in Europe, a similar level of excitement is building around *Yo-Kai Watch*, which is being repped by Paris-headquartered VIZ Media Europe. The company will officially unveil the property at Brand Licensing this month.

"Everyone is telling us this is the Japanese property they've been waiting for," says Pascal Bonnet, EMEA senior director of films, TV sales and licensing at VIZ Media Europe. He adds the brand's core values of friendship, humor and collectibility should translate well to both North American and European audiences. "It's a combination of Ben 10, Pokémon, Beyblade and universal Japanese storytelling."

Bonnet says the European merchandising strategy will involve working closely with Level-5, Hasbro Europe and Nintendo Europe, and other key categories will likely include publishing, collectibles, apparel, promotions and confectionery.

Ideally, he says the series will premiere on European pay TV in April 2016, when Nintendo's 3DS game launches, and then on a major free-to-air broadcaster in all major European languages in September 2016, in lockstep with Hasbro's toy range. Collectibles and impulse items could launch next Q3/Q4 as well, and then the bulk of the licensing program should hit mass European retail in 2017.

Bonnet says he's in final negotiations with leading European kidsnets, which, like scores of licensees, want to be a part of the mega-franchise that already has 82 episodes in the vault. "All the opinion leaders, TV buyers and licensing buyers think it could be the next big, big thing," he notes. —Patrick Callan

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Who For more than 60 years, New York-based Rubie's Costume Company has been a leader in designing, manufacturing and distributing costumes and accessories. The family-run business is renowned for creating bestselling products for toddlers, kids, teens, tweens, adult and pets, sold in national retail chains, toys stores, costume shops, variety stores and other specialty retailers around the world.

With several A-list entertainment licenses in its portfolio, including Minions, Batman Unlimited, Marvel's Avengers and Teenage Mutant Ninja Turtles, Rubie's is one of the premiere licensees in the children's dress-up market. In fact, licensed character costumes for kids 13 and under comprise 50% of sales for the company's kids costume segment.

While also equipped with themed outfits for special occasions such as Easter and Christmas, and everyday generic costumes, Halloween is Rubie's bread and butter—a full 75% of its annual business is realized in the run up to October 31.

What According to Rubie's EVP Howie Beige, the hottest kids Halloween costumes for 2015 are primarily inspired by blockbuster films released this year, including *Minions*, *Ant-Man*, and superheroes Iron Man and Captain America from *Avengers: Age of Ultron*. However, perennial favorites like Teenage Mutant Ninja Turtles and Batman and co. (Joker, Catwoman, Batgirl, Harley Quinn) have been top sellers for the past 10 to 15 years. With *Star Wars: Episode VII – The Force Awakens* premiering in December, Beige expects plenty of trick-or-treaters will also don costumes of their favorite characters from the iconic franchise. But with the movie launching post-Halloween, he predicts 2016 will be the bigger year for Star Wars costumes.

What's new Key trends in the business are growth in DIY costumes (particularly with tweens/teens), better overall quality, and families dressing up as one theme (Minions, Wizard of Oz, superhero ensembles) and including their pets.

"There's been tremendous growth in the pet costume category—20% per year—it's absolutely astounding. People are definitely treating pets the same way they treat children, and they're buying better quality costumes for their pets," Beige says.

But furry friends aren't the only ones being fitted with better Halloween getups. Beige says manufacturers like Rubie's have upped their costume game, while keeping key price-points steady at between US\$19.99 and US\$29.99.

"If you go back eight or nine years ago, the majority of costumes were just made with 70 denier nylon fabric. Today, you're seeing companies use gabardines, heavy polyesters, faux velvet, embroidered fabrics, treated fabrics with molded muscle chests in them, better quality printing, more vibrant colors, raised printing using glitter and sequined trims."

What's next For Halloween 2016 and beyond, Rubie's has two key innovations in the pipeline to further bring its licensed costumes to life. "You're going to see us emphasize adding light and sounds, particularly in kids costumes," Beige says. With *Batman vs. Superman: Dawn of Justice* hitting theaters March 2016, Rubie's plans to add fibre optic backlights to the costumes' chest logos, a significant improvement from the LED lights Rubie's has previously used, Beige says.

And hoping to tap into the buzz from two other upcoming movie releases, Beige says Rubie's is also looking at adding lights and sounds to its Star Wars and TMNT costumes (*Teenage Mutant Ninja Turtles 2* hits theaters next June). "We're looking at certain ones that will actually have voices and say different phrases in the costumes," Beige says. "For instance, imagine a Teenage Mutant Ninja Turtles costume for a young child saying, 'Cowabunga, dude!'"

Contact Howard Beige, EVP, Rubie's Costume Company (516-326-1500, howie@rubies.com) —Patrick Callan



Licensed characters own 50% of Rubie's kids costumes sales

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Erasing the line

Children are deciding—from a very early age—that they do not want to be limited by their gender or adhere to traditional sex stereotypes. It's all about bending and extending gender now.



BY WYNNE TYREE

Children's understanding of gender begins as toddlers, and by age four, they have a firm grasp of being either a boy or a girl. And retailers typically start to sort merchandise into separate aisles—one for boys, and one for girls—for kids this age, not only for toys, but also in departments such as entertainment and room décor. Until now. Target recently announced that it will make its children's aisles more gender-neutral, going so far as to remove the pink and blue backgrounds from its shelves. And while Target is the first US retailer to break the mold, we don't expect it will be alone for long.

Enough is enough

Target's decision comes after adult shoppers complained about the segregation of gender in children's departments, but kids themselves have been ranting about this issue for years. Lately, brands have responded by addressing attitudes about gender in their marketing. Apparel maker Under Armour likely owes much of its recent growth to its embrace of female athletes. It followed up its remarkable "I Will What I Want" campaign featuring dancer Misty Copeland with an interactive ad featuring Gisele Bündchen, demonstrating that even fashion models can be powerful, strong women. Likewise, Always earned universal praise for its "Like A Girl" campaign that drew attention to the ridiculousness of the language used to describe concepts like "throwing like a girl."

Toys and gear for boys...or girls

Toy manufacturers are getting the message. Warner Bros. and DC Comics recently announced DC Super Hero Girls, showcasing teen characters such as Batgirl and Wonder Woman as they discover their special powers and learn to be heroes. Kickstarter-based GoldieBlox—which has continued to increase distribution—and Project Mc² dolls from

MGA Entertainment are also reminding girls that traditional boy play patterns and subject areas aren't just for boys.

Not all efforts have been focused on the female side of the equation. In 2013, Hasbro responded to a young consumer's petition by creating an Easy-Bake oven in boy-friendly silver, blue and black to complement its purple-and-pink model. Hasbro has also seen a surge in boys' love of "girl brands" like My Little Pony. Yes, Bronies young and old continue to join the fun at the stables.

At the same time, gender-disrupting clothing brands such as Handsome In Pink are calling into question the idea that colors are gendered at all. The brand's line includes purple t-shirts with pink bikes on them for boys, as well as options for girls, such as a shirt that reads "girly girl" spelled out with items like baseball bats, scooters and science equipment.

Gender schmender

These efforts go beyond "taking back the pink aisle" to embracing a gender-neutral movement that advocates for greater equality among men and women, boys and girls. In various ways, children are seeing the disintegration of traditional gender stereotypes. One key aspect is the depiction of gender roles in entertainment. Men are the stars of many cooking shows, and women are mainstays on shows about science and building. Even media created specifically for children is reflecting new gender norms. Take Nickelodeon's *Bella and the Bulldogs*, where the main character is a female football player, or their newest show *Game Shakers* starring two girls as game developers. And we can't forget TLC's new *I Am Jazz*, a reality show that chronicles the life of a young transgender teen girl.

While the efforts of these brands and companies seem significant and even a little risky from a marketing perspective, they are, in fact, merely reflecting a new reality in which gender is less relevant to young consumers. Children today are growing up in households where dad may be the parent

What's so great about...destruction?

BY BARRIE ADLEBERG



Parents applaud with glee when kids build block towers. The developmental link is clear—they are beginning to define shapes and play with spatial reasoning and creative imaging. “She’s the next Frank Lloyd Wright!,” mom says. Adults love the idea that these crude structures could be the first works in kids’ future architecture or engineering portfolios. But are we equally thrilled when we enter a room of toys that looks like the wreckage after a demolition derby? What we fail to recognize as we collect pieces of debris from their destruction epicenters is that our children’s experimentation with deconstruction is just as vital as their construction processes.

By building and breaking down, and building again, kids start to tinker with iterative process, fine-tuning their designs. This is not only an exercise in practice and precision,

but it reaffirms their sense of gravity, informing their understanding of early physics.

Infants start to discriminate visual patterns as early as one month old. This development models early processing of figure-ground perception (recognizing objects). As kids grow and build imaginative structures and basic systems, they begin to experiment more meaningfully with early geometry—ideas of Lego construction and puzzle piecing as motor skills develop (and the small pieces are no longer a choking hazard).

Enter the age of virtual building. When kids play in *Minecraft*, they spend nearly as much time mining, seizing and creating new building materials as they do actually building. Mining is by no stretch a craft *and* a science. Demolition and collecting wreckage are key game mechanics. Kids have to break down and combine block compounds to source their desired materials. In this deconstruction, chemistry learning is a by-product of sheer experimental play.

From *Tetris* to *Candy Crush*, kids are using digital games to master pattern recognition and refine spatial concepts. These game spaces are taking the classic play practice of building with blocks to teach 21st century skills, such as coding. Visual coding platforms that use block language cultivate early learning systems thinking, logical reasoning, and sequencing. Kids can use game-makers like Scratch, Beta, Gamestar Mechanic, and a plethora of sandbox games to create virtual spaces for themselves and their peers to play in. De-bugging in these game worlds compels kids to un-build something broken in order to identify the problem and re-build something functional.

For TV content, consider depicting lots of building and busting up, and showing the process. You may just be helping a kid learn to code!



insight Kids Barrie Adleberg is a senior analyst at Insight Kids, a passionate team of business strategists and developmental experts who spend their waking hours pondering and communicating timeless truths and timely trends. Through innovative market research and consulting, they bring the voice of the child to the creative process, helping their clients create products and experiences that meet kids where they are. To connect with Insight Kids, please email info@InsightStrategyGroup.com, or check out www.InsightKids.com.

who stays at home to raise the kids and cooks family dinners, and mom may be the parent who wears a suit to work and helps the kids perfect their basketball moves. Kids believe they can do or be anything they want, regardless of their gender, because they see evidence of the fact in their daily lives. As a result, marketing and products created to be gender-specific feel incongruous.

A new era

Even as the shift toward gender-neutrality gains momentum, gender-specific kids toys, games, furnishings and media will continue to exist. However, the companies producing them will need to recognize that even though their

products are intended for either girls or boys, a portion of their consumers will likely be from the other gender. To be more inclusive and reach a wider market, companies can easily tweak their messaging to be more general, for example, by referring to kids rather than boys or girls. After all, that is increasingly how children today think of themselves—as kids first and foremost. **k**



Wynne Tyree is the president of Smarty Pants, a youth and family research and consulting firm. Heads Up! is derived from the company's daily in-person and digital immersion into kids' and families' lives, as well as proprietary quantitative research. For more information contact Meredith Franck at 914-939-1897 or visit asksmartypants.com.



Girls want funny. Boys crave personalization. New PlayScience research analyzes and debunks gender perceptions in the interactive space.

BY WENDY
GOLDMAN GETZLER

We've been conditioned to accept that men may be from Mars and women from Venus—but when it comes to boys, girls and playtime, labels are far from universal. This past summer, American retail giant Target made headlines with its plans to remove gender-based signs from its stores, citing a shift in shopping preferences and consumer needs. Similar changes have been implemented by several global retailers like Toys 'R' Us in the UK. Yet gendered toys, apps and digital platforms still abound, as do a number of gender discrepancies, particularly within the digital spectrum. With the help of New York-based innovation and development company PlayScience and the Casual Games Association, new research is unearthing some surprising gender perceptions—and causing the formation of new ones at the same time.

Parents lead the charge

For CEO Alison Bryant and her team at PlayScience, what started off as a basic study on kids' app preferences quickly

spiraled into something much more disruptive. "Kids categories are a mystery when it comes to digital," says Bryant. "But things got a lot more interesting than simply finding out if children are playing *Angry Birds* or not."

Among the discoveries made in *Kid Appeal*, which surveyed more than 1,350 American kids ages six to 14 and their parents, is the fact that parents are 30% more likely to let their sons choose their own apps versus their daughters. Parents are also nearly 10% more likely to want apps that focus on academic skills for their daughters, and they are 13% more likely to pay for an app for their sons. According to PlayScience's spring 2015 study, *Parents and Platform Perceptions*, platforms are also getting the preferential treatment, as parents are more likely to opt for tablets for their daughters at 73% vs 65% for sons, and they are three times more likely to favor a smartphone (15% vs 6%) or video gaming device (21% vs 7%) for boys.

The disparities may point to parents' pre-conceived notions of trusting boys more than girls to select appropriate content—or parents could be less stringent about the ma-

terial to which boys are exposed. “When looking at tweens and teens and issues of protection, you can see how safety comes into play. But we are talking about young school-age kids, and gender preferences are surprising at this age,” says Bryant. “It’s interesting to see parents reflect on their practices. From a consumer standpoint, are we more fearful of tech when it comes to girls?”

Bryant says the fact that parents are buying more for their sons—commonly a subconscious practice—may also be due to the fact that boys can be more persistent in asking for an app. Motives aside, the end result means boys are more often left to download apps with potentially negative content and less educational value, while parents continue to lean more towards educational content when it comes to girls.

“In some respects, we are seeing a backlash even in schools. In general, girls are driving the classroom. It’s ironic when you think of STEM and those careers that we can’t seem to get girls into,” Bryant says. “One of the most interesting things is the hypocrisy. Boys are more likely to play with video game systems, but maybe that’s because gaming content isn’t girl-inspiring.”

Blurred lines

Something that is enthusing young girls in the app space is humor. According to *Kid Appeal* findings, girls are 30% more likely to prefer apps that are humorous, which goes against pre-conceived notions that boys prefer the funny stuff.

“We shouldn’t hold assumptions over what girls and boys like in terms of content. The humor finding is one of most interesting things to emerge from the study. Funny is still a number-one requirement for girls, too,” says Bryant. “The games that perform best across the board are those that also reach girls. Can you have gender-neutral humor? Of course. *Phineas and Ferb* is a good example, as is *Frozen*. A character like Olaf appeals to both sexes.”

Top playful apps by gender

What is your favorite app?

16%
Minecraft
Pocket Edition



11%
Candy Crush
Saga



10%
Angry Birds



10%
Angry Birds



6%
Clash of Clans



9%
Minecraft
Pocket Edition



6%
Candy Crush
Saga



6%
ABCmouse.com



4%
Angry Birds
Star Wars



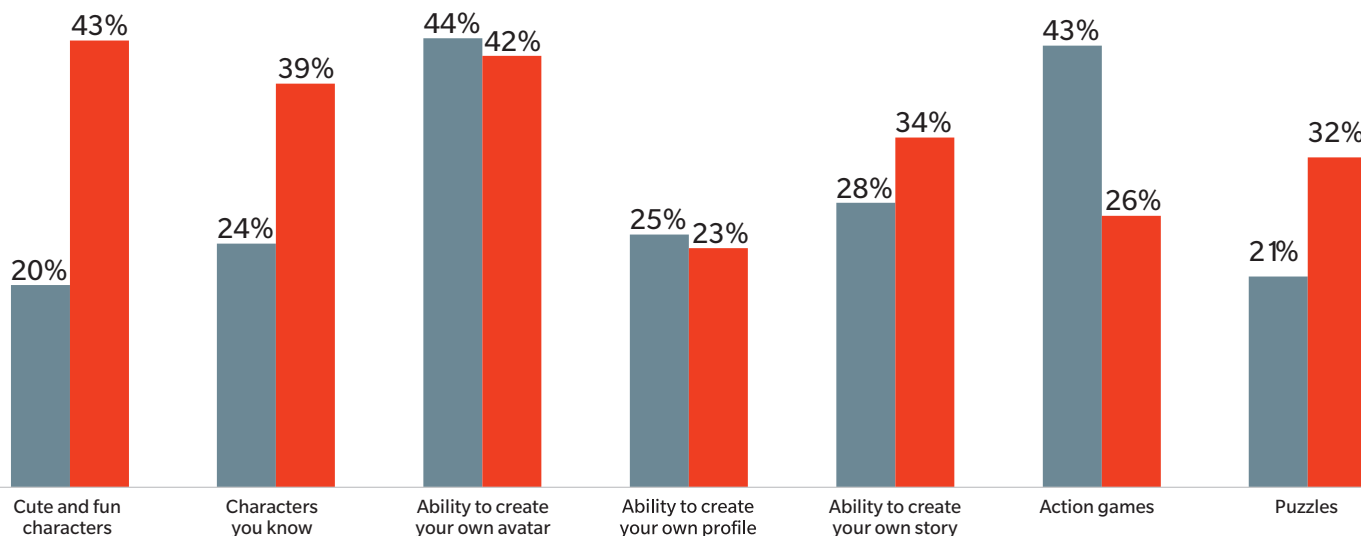
6%
Candy Crush
Soda Saga



© PlayScience 2015

In their ideal playful app...

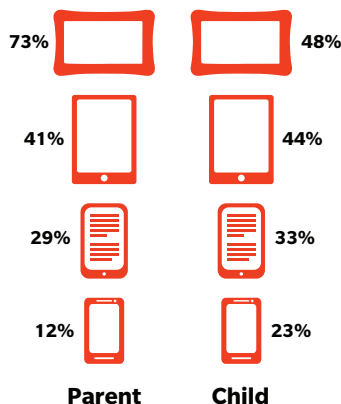
boys want action and avatars, and girls want characters and narrative



Not all mobile is created equal

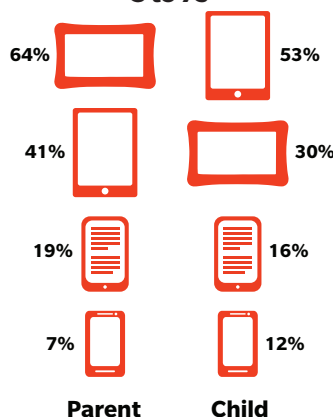
Parent & Child device preferences

2 to 4s

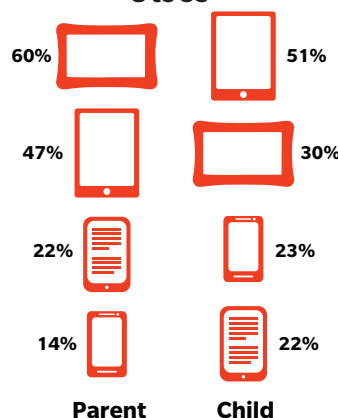


Tablet tipping point

5 to 7s



8 to 9s



© PlayScience 2015

In the same vein, Bryant says apps that center on personalization aren't often focused on boys, but without warrant. The studies show that both boys and girls want personalization in their digital experiences; however, their play patterns aren't as aligned. "We see that boys tend to personalize functionally with an end result in mind. They will accessorize a character for a reason. Meanwhile, girls do it for the fun itself. Still, when it comes to personalization, there are a lot more similarities than there are differences," says Bryant.

In fact, *Kid Appeal* stats point to a relatively balanced playing field when it comes to children's app preferences, a majority of which appeal to both genders. With a 43% share, the most important app feature for both genders is the ability to create an avatar, followed by a points and rewards system. However, it is twice as important for girls than for boys to have enjoyable characters as part of their ideal app, while boys are more concerned with the game itself and are more likely to want their app to include action games. Boys are also less likely than girls to want story creation, puzzles and quizzes.

In terms of the apps themselves, both *Minecraft* and *Angry Birds* made the top-five list for six- to 11-year-olds. However, boys also included *Clash of Clans* in their top three, while girls' number-one game was *Candy Crush Saga*. On the educational front, *ABCmouse.com* was the top game across both genders.

(Interestingly, while the ability to create an avatar is highly coveted among kids, *Minecraft* is the only app on their top-10 list that actually allows them to customize players.)

Tablets > smartphones

If there's any battle of the sexes taking place, it's not necessarily happening on a tablet. Across the board, boys and girls prefer tablets to smartphones by almost two to one, and 45% will choose a tablet to play games compared with the 25% who opt for a smartphone.

According to Bryant, tablets are king until kids get to an age when social becomes critical. At ages 10 to 12 for girls, phones are communicative. For boys, smartphones become handy at around ages 11 to 13. The trend may stem from the fact that young children are more likely to personally own tablets. "The Kindle Fire lowered the price-point and made tablets more accessible. Young kids want to watch videos and play games, and that's easier to do on a tablet."

Kid Appeal findings also reiterate the notion that tablets are as much learning devices as they are entertainment ones. "Kids know when something is educational, and they don't care. They want to work and play a game," says Bryant. "Achievement is a huge part of any app. Kids want to learn to see what they are really good at, and they want to be expert at something—whether it's dinosaurs or skateboarding."

From a marketer's perspective, Bryant says kids will often gravitate toward an app's entertainment value first, and then build up its educational value in order to hook their parents. "The approach may be to get kids on-board and then attract the parents with educational buzzwords," says Bryant. "Kids know exactly what to pick out and sell." Of course, when it comes to all kids, that sort of innate craftiness knows no bounds.

The Digits

Numbers that speak volumes about kids and technology

UK parents will spend an average of

US\$414

on items such as smartphones and tablets as they send their kids back to school this year (uSwitch)



Photo: Images Money

In the US, kids' tablet usage

peaks at **69%** around age 10, and decreases to **57%** between ages 11 and 13 (Nielsen)



A fifth of American families with two- to four-year-old children have changed video service providers in the past

12 months

(Dubit)

Nearly a quarter (24%) of German kids ages six to 13 are playing videogames daily

—or almost every day, while 38% play at least once per week

(Medienpädagogischer Forschungsverbund Südwest - MPFS)





Christian Larocque
Supervising Director of Animation
Mercury Filmworks

“ As a traditional animator, I love the flexibility of the Envelope Deformers in Harmony. They allow me to create animations that maintain the level of quality of hand drawn animation while producing content at a much faster pace. ”



Disney Television Animation's The Lion Guard
Animation by Mercury Filmworks for Disney Television Animation
Copyright © Disney Television Animation



Find out more at
toonboom.com/kidscreen2015

Henson opted for a global Netflix deal for its new preschool series *Word Party*



Windows of opportunity?

BY JEREMY DICKSON

As kids content becomes increasingly important for linear and non-linear platforms in the “golden age of television,” we take a look at how distributors and broadcasters are currently managing the complexities of negotiating rights and windows.

This we know: The kids TV landscape is no longer what it used to be pre-Netflix, YouTube, Amazon and Hulu. Netflix, in particular, now boasts more than 65 million subscribers worldwide, and its global content spend will approach a colossal US\$5 billion in 2016. In short, the rapid shift in kids and family viewing habits from more traditional appointment television to SVOD platforms and time-shifted viewing is having an impact on all areas of kids programming from development, funding and production, to marketing, distribution and acquisitions.

Distributors, in particular, now have the complicated job of determining how to parcel out original and third-party content amongst a growing number of emerging local digital kids platforms, the major global SVOD companies, and traditional broadcasters with catch-up services. The issue? All parties are clamoring to control as many rights as they can, including the most alluring of them all—the exclusive first window.

D is for dynamite deal

The most recent reflection of how much the arrival of SVOD has changed the industry occurred on August 13 when HBO entered into a five-year agreement with Sesame Workshop to bring the next five seasons of the iconic *Sesame Street* to the subscription cable giant and its multiplex channels. The landmark deal will see HBO debut the new 46th season of *Sesame Street* this fall, nine months ahead of longtime broadcaster PBS KIDS and its member stations.

While the exclusive, first-run aspect of the partnership has drawn criticism in the US consumer press for limiting access to the series to families who can afford HBO, the deal has been lauded within the children's TV business. Put simply, without HBO's financial help, *Sesame Street* may have ceased production. The Workshop will now be able to continue offering the series to PBS viewers for free and will produce nearly twice as much new content with season episode totals increasing from 18 to 35.

In a company statement, Sesame Workshop CEO Jeffrey Dunn said that the deal represents a great merging of public and private funding models, wherein HBO will provide the show with critical funding that can then be applied to the programming and educational outreach of the 45-year-old nonprofit.

The deal also sheds light on the rising value of high-quality kids content to SVOD companies that don't have massive libraries of children's shows, like Netflix or Amazon.

Subscriber retention

In a recent *Kidscreen* online exclusive, HBO president of programming Michael Lombardo said, “We have been discussing the children's area more and more recently, especially in light of our expansion into streaming platforms with HBO GO and HBO NOW.

“Children's programming plays very well on those types of services. So, when Jeff Dunn began talking to us about *Sesame Street*, it didn't take us very long to realize that it was a perfect fit.”

As to whether or not HBO will increase its investment in kids content, Lombardo contends that the network will be very selective if it chooses to pursue children's programming and is in no hurry to grow a large library.

However, recent reports examining churn rates for SVOD services may explain why it could be in HBO's best interest to keep up with the Netflixes and the Amazons of the world when it comes to kids content. According to the OTT Video Market Tracker from US research firm Parks Associates, cancellation rates are very high for OTTs compared to cable networks. Approximately 4% of US broadband homes have discontinued their Netflix subscription in the last year, accounting for almost 9% of the SVOD's subscriber base. And Hulu's 7% churn rate for its Hulu Plus service over the past year represents a whopping 50% of its subscriber base.

The data suggests adult viewers have an easy time cancelling or switching their services after binge-watching their favorite shows. Taking into account subscribers who are parents of young children, it makes sense that SVOD services would want to increase the long-term loyalty of this group by offering easily accessible, quality kids shows.

In David Kleeman's recent *Kidscreen* blog “Children are the future of SVOD,” the SVP of global trends for UK-based digital agency Dubit submits that children's programming is the glue that keeps families subscribed to an SVOD service in between new seasons of flagship shows for adults. Interestingly, Dubit Trending's second wave of its quarterly tracking survey found that 20% of US families in VOD households responding on behalf of two- to four-year-old children have changed video service providers in the past 12 months—higher than parents of any other age group (five to seven, eight to 10, 11 to 15). The survey also found that convenience and access to favorite series in their entirety were the most appealing features of OTT video for parents of kids of all ages.

With opportunities for OTT services to offer either more, or the right balance of quality preschool shows with the rest of their kids and family lineups, producers and distributors are turning the heat up on their SVOD business.

Fair play

The Jim Henson Company, for example, has as a long history of successful worldwide digital distribution growth. It produced Hulu's first original kids show *Doozers*. Jim Henson Family TV was one of YouTube's first paid channels. Its preschool toon *Word Party*, meanwhile, will launch as a Netflix Original series in 2016, and new series *Lily the Unicorn* marks the studio's second pilot for Amazon Studios.

EVP of global distribution Richard Goldsmith says the digital platforms that have emerged have had a dramatic impact on what The Jim Henson Company produces and how it distributes content. "Not only are they clients for our TV content as second windows, but they also have increased our reach, and therefore brand awareness, which allows us to merchandise our properties," Goldsmith says.

But it's not all smooth sailing. The biggest day-to-day challenge, he notes, is negotiating fair rights and windows. "Virtually every client we work with in the TV, DVD or VOD business wants to control as many rights as they can and limit what we do with those rights," he notes. "So every single deal becomes a long negotiation about what is equitable both from a monetary and a rights and windowing standpoint," he says. "The other main issue we face is discoverability of our series amongst all of the existing and new platforms."

To boost brand awareness, Henson has employed a number of different tactics. In its deal with Hulu and US home entertainment partner NCircle for the recent *Doozers* DVD launch, the company offered a promotion whereby DVD buyers could receive a free month of Hulu.

The Jim Henson Family TV YouTube channel is also used, according to Goldsmith, as a means to distribute limited content with branding from Henson's other partner platforms. "We do this both globally and locally," he says.

Global vs. local SVOD deals

Speaking of global, in addition to regular negotiation and discoverability issues, distributors now have to contend with the expansion and influence of Netflix, which is currently in more than 50 countries and increasingly looking to secure exclusive global rights for the series it commissions and acquires. But local SVOD services are also proliferating. So when does it make sense for a distributor to sign a global deal with Netflix versus parceling content out to local partners?

Due diligence is the approach taken by Hasbro Studios SVP of global distribution and development Finn Arnesen. "You have to go into these types of negotiations knowing what you want," he contends. "If an SVOD platform wants a global deal, then you as the producer and distributor have to find out what global really means because there are certain platforms that aren't truly global yet. If you do want global reach, then you have to look at either TV networks or other platforms that really do have global impressions. You need to look at your markets regionally and find out where you're strong and where you need to be stronger."

For Goldsmith, it's a matter of looking at what you have to offer first. "When we have shows where worldwide rights are available, we generally pitch those series to traditional TV networks (first windows) and SVOD platforms (second windows) that are both global," he says. "One of the main differences between the two scenarios is when you do a deal with one of the global SVOD platforms, it's not likely to have the largest viewership in every given country in the world. If we lead with TV, it at least gives us the ability to have a first window on a very large platform that we can handpick in every market around the world." Although there can be benefits to working with one global SVOD platform, he notes. "You benefit from all of their marketing and promotional support versus having to coordinate with myriad partners."

Josh Scherba, SVP of distribution at DHX Media, agrees that Netflix's more global approach is having an impact on deal negotiations. But he sees strong parallels between SVOD deal-making today and traditional broadcast deals carried out with the global kidsnets. "There will absolutely be opportunities to do SVOD deals on a local basis, territory by territory," he says. "There are a great number of emerging



Jetpack acquired exclusive global distribution rights to Pop-Up Workshop's *The Moe Show* in February, but is looking at divvying them up territory by territory

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Hasbro's *My Little Pony* is one of the most popular shows on Netflix's algorithm

SVOD partners, whether it's Sky pushing into SVOD in the UK, Canal+ in France, DLA in Latin America or a service in Spain we've worked with called Wuaki TV—they will all be competing on some level with the US-based SVOD giants." For his own deals, Scherba decides DHX's direction based on the IP in question. "One of our main objectives is to determine the best platform for the IP in terms of exposure and connecting with the audience we're trying to reach. Then we weigh the economic realities of producing children's TV and look to get the best financial deal that we can."

"Everybody would love to sign a nice global acquisition with one of the global studios because it makes great sense to get your product out quickly in one deal, but the reality now is there are more small players who need content," contends Dominic Gardiner, CEO of London-based boutique operation Jetpack Distribution. "However, looking at digital and VOD, the amount of money that is available in some markets is quite small, even with low-cost digital delivery. The market is growing, which is great, but the money is not quite there yet outside of services like Netflix and Amazon." Additionally, SVOD is only part of the plan when it comes to series with consumer products aspirations. "SVOD can't carry the brand on its own," he says. "Windowing needs to be reflective of the audience's needs, and what people are prepared to pay for, as well as ensuring that any ancillary revenues are properly supported. The model hasn't really changed—there has just been a shift in terms of who vies for first position on a new IP."

Seizing the moment

The fact that Netflix has become the first window for several series, not to mention 300 hours of original programming from DreamWorks Animation, however, indicates just how much the traditional broadcast business has been disrupted by the rise of SVOD services. In the US, cable companies shed 658,450 subscribers in the second quarter of 2015—their worst-ever quarterly drop in subscribers, according to global tech analyst IHS. And fears around the health of the TV biz resulted in big stock-price slides in August for Disney, Viacom, DreamWorks Animation and Time Warner. But despite the uncertainty and falling US ratings for kids-specific nets, new reports reveal that linear kids TV is actually much better off than many analysts previously believed.

According to Nielsen's new study *Kids Audience Behavior Across Platforms*, traditional TV is still the favored platform of media consumption for preschoolers through teens, and children's programming remains the most popular TV genre for all kids ages two to 17. Similarly, new research from PwC's US Consumer Intelligence's *Media-savvy kids, teens want engaging stories on multiple devices* found that 79% of kids who watch TV are choosing network TV shows, kids eight to 18 engage most in viewing live network television and kids learn about new programming primarily through commercials. For Viacom's SVP of international program sales Caroline Beaton, linear TV is definitely not a thing of the past, but it is changing.

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A platform-agnostic world

Beaton points to an international study commissioned by VMN earlier this year entitled *TV Redefined*. Among its survey respondents ages six to 34, the report found that 71% of viewers go to TV first to discover programs; the ability to access content in multiple ways leads to higher engagement with television only if the content is compelling to viewers; and there is no dominant non-linear content source.

"The research supports that you can't really separate linear from digital in terms of platforms or strategies. You have to become platform-agnostic," says Beaton. "For us, it has been a natural evolution. We started like everyone else by licensing simulcast or catch-up rights on the back of what was essentially a broadcast deal. And now it is not seen as something you can split out. SVOD is a key component of any negotiation we do, even if the deal is driven by a linear platform."

For the company's deals with both global and local platforms, Beaton says Viacom creates windowing strategies based on what the viewer wants the most. For example, its exclusive, long-term deal with Swedish VOD platform Viaplay for 1,400 episodes of Nick series came about, in part, because kids tend to be early adopters of mobile technology in the Nordic region, and its TV landscape is changing.

"There are various broadcasters around the world that no longer have linear slots for kids content. These include TV2 Norway and TV4 Sweden that are launching their kids content straight to their SVOD platforms," says Beaton. "They don't see this as a radical change, but I don't think the whole world is suddenly going to go straight to SVOD with no linear. It goes back to using the platform-agnostic approach."

For Sam Tewungwa, BBC Worldwide's commercial director of TV and VOD sales, there is no one-size-fits-all solution when it comes to forging a global versus local deal. There are tradeoffs around control, flexibility and efficiency.

"If you want, for instance, to build a CP business off the back of your licensing activity, you're going to want more control over how your show is windowed, scheduled and marketed in individual territories," Tewungwa says. "On the other hand, if you're not trying to build a big CP business, it may make sense to do one global deal rather than multiple local deals and give up some of the control, if the financial numbers make sense."


When asked about the issue of pubcasters wanting more full series to put up all at once on their own VOD

services for catch-up viewing, Beaton says the concern is more about what the market will bear. "Regardless of whether you have non-exclusive windowing or one party with exclusive rights, what you don't want is saturation of a brand or a show to the point where it has no value," she says. "No matter how much preschoolers will watch the same episode, you don't want your programming in heavy rotation across free services, because viewers will lose interest."

Goldsmith says he understands the need for broadcasters to preserve their audience and have a robust offering, but distributors should be mindful of their additional digital rights when negotiating catch-up rights with broadcasters. "We need to limit how much is available to be seen for free, as it significantly affects our transactional business," he says.

Looking to the future, Beaton suggests that data will play a much bigger role in how distribution deals play out. "How quickly will the measurement mechanisms catch up to prove that all of the things we're doing outside of linear are working, and how quickly will the rest of the world catch up? Will all our consumer products partners think that non-linear is as important as linear?" she muses. "This disparity is interesting and directly correlates to ad revenues, but we expect to see many new ad sale models and ways to generate revenue down the road."

For all the ins and outs of windowing and the contentious nature of program rights, CAKE Entertainment MD and CCO Ed Galton believes, "We're in a good era at the moment."

He notes that well over 50% of CAKE's business is now in digital distribution and that Netflix is its biggest client. "But we're selling our content farther and wider than we ever have before. It's not just a free-TV, pay-TV, home entertainment deal anymore. As far as exclusivity, I'm not sure that every SVOD platform in the kids space has the need for exclusive content because kids consume content on all types of different platforms and it doesn't matter whether it sits on one or many—it's still going to get watched." 

Viacom has opted for local SVOD partners in the Nordics—TV2 Norway and TV4 Sweden now send kids TV series straight to streaming

"How quickly will the measurement mechanisms catch up to prove that all of the things we're doing outside of linear are working?"

—Caroline Beaton, Viacom

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Cool new shows!

BY LANA CASTLEMAN



Concept British comedians/gamers Lewis Brindley and Simon Lane created Xephos and Honeydew to serve as their *Minecraft* avatars. The pair has since built Yogcast, a YouTube channel featuring the odd-couple characters and their adventures in the sandbox-type game that has more than 7.3 million subscribers and in excess of 3.1 billion views. This animated comedy finds the straitlaced Honeydew (his favorite color is brown) and the more eccentric Xephos (his preferred hue is The Mystery of Magenta) working at Yog Labs on a distant planet that takes some visual cues from the world of *Minecraft*. At the lab, they conduct experiments that test the laws of physics and common sense. Creating arrows that shoot pigs—which in turn shoot rainbows—seems like a pretty good idea, doesn't it?

9 to 11

Zephos & Honeydew

Producer Eye Present (UK)

Style Mixed media

Format 52 x 11 minutes

Budget US\$275,000/half hour

Status A bible and pilot, along with several scripts, have been completed. Eye Present is currently on the hunt for co-production partners.

Delivery 2017

Super Movers

Producer 9 Story Media Group (Canada)

Style 2D animation

Format 52 x 11 minutes

Budget Between US\$350,000 and US\$400,000/half hour

Status In development. A bible, an animatic and a two-minute demo will be ready for MIPCOM.

Delivery TBA

Concept The Imagination Movers, the preschool super-group from the hit Disney Junior series of the same name, are getting animated—quite literally. In this new comedic preschool series, the musical quartet's members find themselves as accidental superheroes. Rich, known for having a motor-mouth, gets the power of super speed. Sensitive Scott finds he is able to move things with his mind. Natural-born klutz Dave can turn into a super gummy bear, while rubber-limbed Smitty gets the gift of super stretch. And through their adventures, they help preschoolers discover their own "super powers." Ex-Pixar talent Jason Boose oversaw character design and is art directing the entire series.

preschool



6 to 9

Zig & Zag

Co-producers Double Z Enterprises (UK), Flickerpix (UK), JAM Media (Ireland, UK)

Style 2D animation

Format 26 x 11 minutes

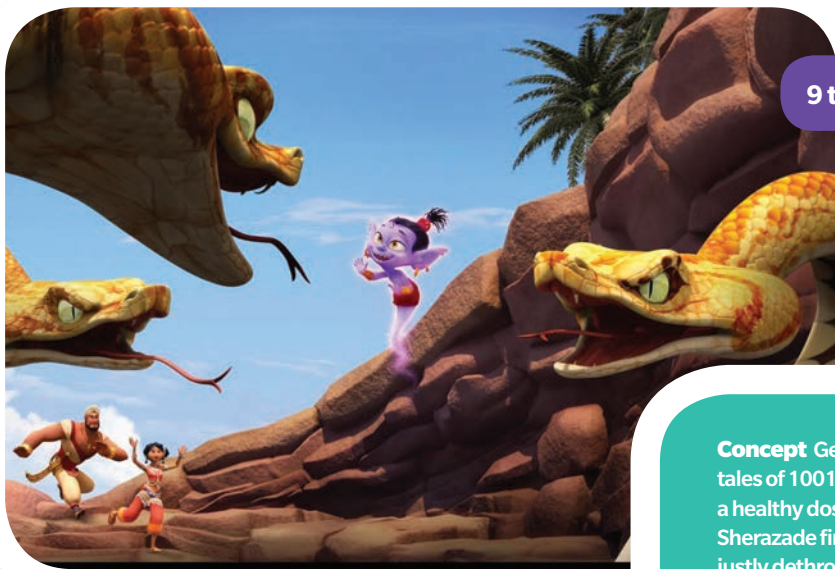
Budget US\$2.9 million

Status Pubcasters CBBC and RTE are on-board, and JAM will have three eps ready for screening at MIPCOM. JAM holds distribution rights outside the UK and Ireland, while Flickerpix is handling L&M.

Delivery Spring 2016



Concept Based on puppet duo Zig & Zag, who served as hosts of Irish pub-caster RTE's *The Den* in the 1980s, this new series takes the characters into the slapstick world of squash-and-stretch animation. As puppets, the pair enjoyed an even more successful career after moving from RTE to Channel 4's *The Big Breakfast* show in the UK. In their new animated world, the alien twins who crash-land on Earth and wind up making a home for themselves, find they have no knowledge of how things work on the planet. Naturally, they wind up wreaking havoc—and generating laughs—wherever they go.



9 to 12

1001 Nights: The Untold Stories

Co-producers Chocolate Liberation Front (Australia), Hahn Film (Germany), Toonz Animation (India)

Style CGI animation

Format 26 x 24 minutes

Budget US\$11 million

Status State broadcaster RBB in Germany and Australia's Network 10 have greenlit the series, which is now in production.

Delivery Early 2016

Concept Gerhard Hahn, of Hahn Films, put a unique twist on the age-old tales of 1001 Nights for this new action-adventure series that's seasoned with a healthy dose of comedy and dotted with original songs. Young teenage girl Sherazade finds herself on a quest to help her friend Karim, who has been unjustly dethroned by his own brother and turned into a big blue hairy monster. On their epic adventure to find a cure for Karim, the pair are helped along by an ancient genie named Halal, who more often than not provides the comic relief, if not shares some much-needed wisdom.

Concept Based on the bestselling picture book series Winnie the Witch (7.5 million copies, 30 languages) from British publisher Oxford University Press, this new cartoon focuses on the friendship between somewhat hapless but well-meaning Winnie and her best feline friend, Wilbur. The smarter of the two, the cat continually helps the young witch out of the self-made scrapes in which she finds herself. For example, in one ep Winnie decides to use her magic to clean up before a party, but her spells go awry and Wilbur sweeps in to save the day.

4 to 7

Winnie and Wilbur

Producer Winduna Enterprises (Scotland)

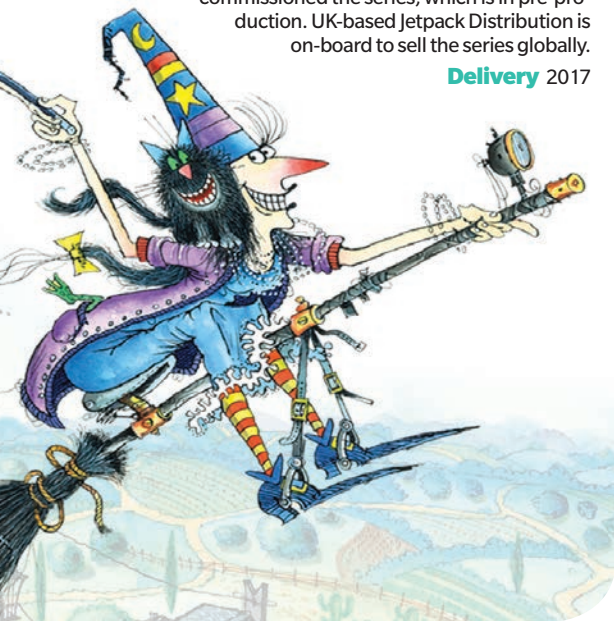
Style 2D animation

Format 52 x 11 minutes

Budget US\$300,000/half hour

Status UK Channel 5's Milkshake! has commissioned the series, which is in pre-production. UK-based Jetpack Distribution is on-board to sell the series globally.

Delivery 2017



6 to 11

Hoodangit and Drybiscuit

Co-producers marbledmedia (Canada), Surprise Bag (US)

Style Mixed media

Format 52 x 11 minutes

Budget US\$330,000/half hour

Status In development with a bible, a teaser and several scripts completed. The co-producers are currently looking for an additional production partner.

Delivery 2017

Concept The Wild West has never looked quite like this before. This post-modern pastiche comedy from the mind of ex-Cartoon Network Studios Europe creator James Fox finds orderly Wilbur Drybiscuit's town of Brown turned upside down by the arrival of energetic and optimistic Clint Hoodangit. He is quickly proclaimed the new sheriff and names Wilbur as his deputy. An unlikely friendship develops between the pair, and together they set about trying to keep Brown in check, while facing down foes and encountering strange happenings, like the appearance of the ghost of the town's dead sheriff, Sparkle Kitten.

YouTube U

Google's video platform has become the most influential player in the media world, but when it comes to putting kids content on YouTube, there's still a lot to learn. Producers share key strategies and tactics that are working right now.

BY BRENDAN CHRISTIE

Imagine, if you can, a world without YouTube—a cold, unfunny, unentertaining world, where children sit in the dust and stare at widescreen televisions to watch whatever content happens to be flowing from their scant 200-plus channels. That terrible world was 2005.

It's hard to reconcile the fact that YouTube is only a decade old. In fact, 10 years ago, it wasn't even owned by Google yet. It was still the playground of founders and former PayPal employees Chad Hurley, Steve Chen and Jawed Karim—who are still probably counting the US\$1.65 billion they got for selling it to Google in 2006.

Now, YouTube is arguably the most influential entertainment platform in the world—not the most valuable—by far—but the most influential. But what is it really? Is it a broadcasting platform? A profit center? A marketing platform? Is it all about building brands and facilitating research?

YouTube is really all of those things, and much more. Today, the platform offers up hundreds of millions of channels of content for more than a billion users, and it's still growing exponentially year over year.



YouTube Kids app set to grow

Earlier this year, Google made headlines with the launch of its *YouTube Kids* app. A walled garden for young viewers, the app is meant to make it safer and easier for children to find videos on topics they want to explore. They can browse channels and playlists in four categories: Shows, Music, Learning and Explore—or just search for videos of interest.

Parental controls include a timer that limits kids' screen time, sound and search settings that keep volumes and searches manageable, and simple product feedback. The ad-supported free app is currently available in the US for Android and iOS devices.

Richard Goldsmith, EVP of global distribution and international consumer products at The Jim Henson Company, calls the app "the most significant event in the last 12 months of the entire children's entertainment business. I believe that it will make YouTube a major player in the global kids TV and video business."

Malik Ducard, global head of family and learning at YouTube, says next steps involve expanding the geographic footprint of the app and offering more tools to content partners.

"When we look on the App Store ratings, we've got four-plus stars," he observes. "We're really excited by that, and it's been fuel for us to advance the experience and continue building it."

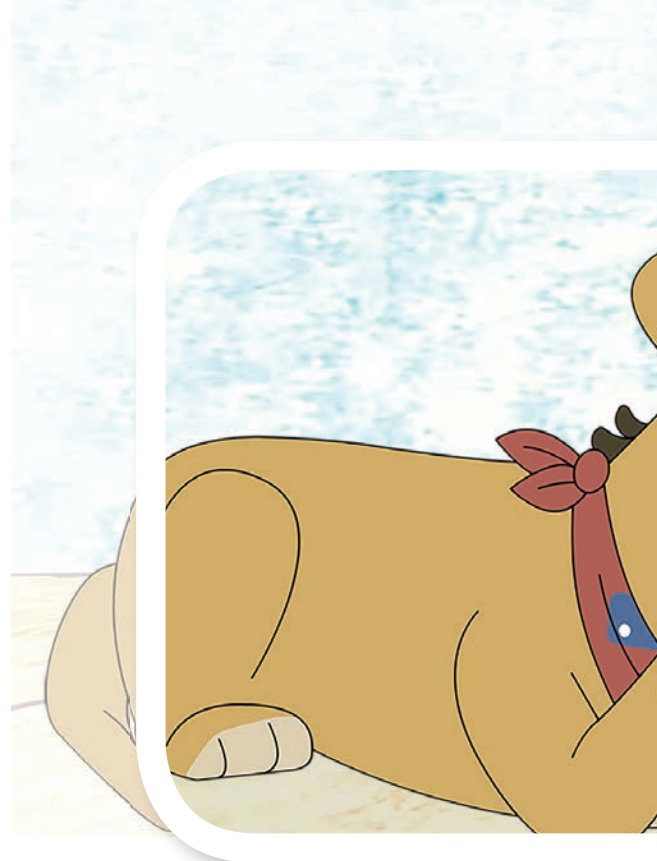
That definitely extends to working with new partners. "Our arms are wide open," says Ducard. "We have an open door, and we're always very interested in engaging in new conversations."

One popular recent move saw YouTube, Maker Studios and *Minecraft* gamer Joseph Garrett hook up to roll out a new StampyLongHead series called *Wonder Quest*. Each episode is set in the *Minecraft* world and will take viewers on a journey that matches core school curriculum. And once kids are done watching, they can download the map of that episode and take their own virtual character into the world of the story and experience it themselves.

"When I was a kid, I couldn't go into Mr. Rogers Neighborhood after the episode," says Ducard with some regret. "But today, kids and parents are able to enter in and have a truly immersive experience."

In fact, Ducard believes that immersion is one of the keys to *YouTube Kids*. "Back when my son was six, when I was testing out the app in the early days, we were watching a trailer from *Phineas and Ferb*. After the video, a 'How to draw Phineas and Ferb' segment came on. We happened to be eating brunch somewhere, and he got one of those placemats and some crayons, and sketched out a pretty good Phineas.

"What I loved about it was that watch time, play time, active time and engagement time all happened together. It just worked so well. I think that's one of the reasons why the app is really resonating with the partners who are creating content, the users who are watching content, and ultimately, parents."



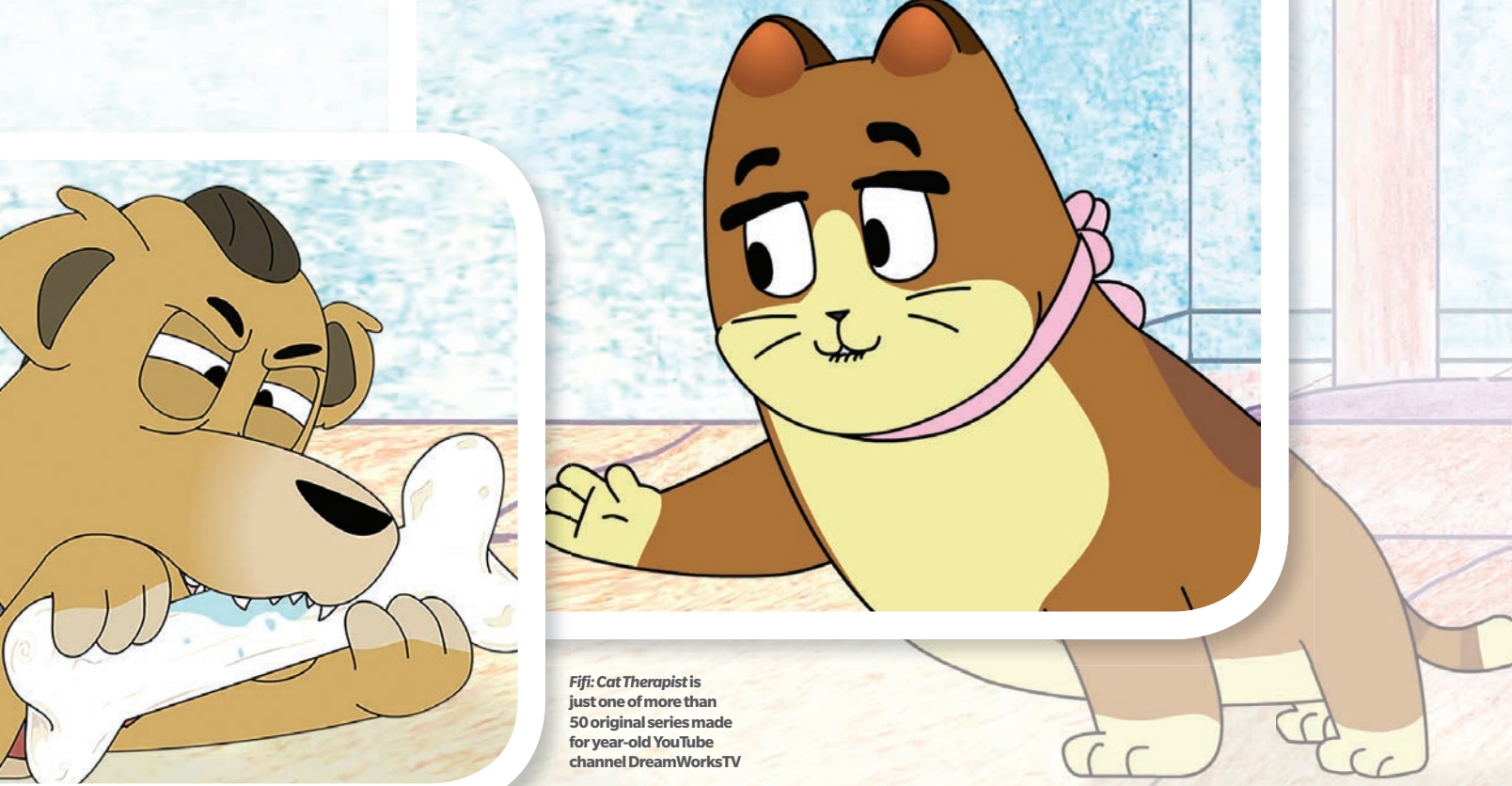
"I think there is no question that YouTube is, if not the first, then one of the first destinations for kids in terms of their entertainment choices," notes Birk Rawlings, head of DreamWorksTV. "YouTube is a great place to aggregate eyeballs and introduce content and characters to the audience we're trying to reach.

"The truth is, it's where our audience lives more than anywhere else. So there's a way of looking at it as a marketing vehicle, but we don't approach it that way. For us, it's one of the best tools we have at our disposal in terms of introducing audience to new things, or keeping them engaged with properties or characters that they already know and love."

Maybe that's the best way to look at it. YouTube is the most interactive platform the industry has had access to yet. It's a giant feedback loop, giving creators back as much as they give. So it's little wonder so much of the industry has decided to live in that space.

When the DreamWorksTV channel launched on YouTube last June, for example, it combined DreamWorks Animation's global family brand with Awesomeness TV's digital savvy to create a new experience for young kids and their families. Half live action, half animation, DreamWorksTV's content is 100% original. Since its launch, families have watched well over 80 million minutes of 50-plus series. It has attracted almost 800,000 subscribers and is approaching half a billion views for series like *Life Hacks* and *Fifi: Cat Therapist*. Not a bad turnout for year one.

Internally, the DreamWorksTV team has grown from one person to 15 in the last 18 months. "I like to think of ourselves as a garage band," says Rawlings. "We are a pretty scrappy little team of people who are just passionate about what we are doing."



Fifi: CatTherapist is just one of more than 50 original series made for year-old YouTube channel DreamWorksTV

Who's in charge here?

Small teams like DreamWorks TV's and passionate individuals are shaping this world. A YouTube channel basically starts as a giant blank canvas. It can be a single video, a constant stream of content, original material, clips, or anything else. It's initially defined by the creators—but then an audience gets holds of it and it evolves.

Problem is, those viewers are also watching a few million other channels. So it's not just about content, it's also about discoverability. How do you manage your brand, content and approach—and package it all in a way so that viewers can find it?

"Ultimately this is going to sound a little bit simplistic," says Rawlings, "but you start by making things for the target audience. For us, it's a question of trying to keep our quality as high as we can within the budgetary framework, producing a wide variety of content, and reacting to what the audience tells us with their viewing habits by doing more of what they appear to like." He adds that he's surprised at the results every day. "By developing out in the public, and letting the audience guide all of our decisions, there's not a day that goes by when there's not a piece of content or a character or a tactic we try that comes out unexpectedly."

Take *Life Hacks*. Rawlings notes his team observed a large number of people were going onto YouTube to search for life-hack content. So DreamWorksTV launched a kid-centric series featuring content that people were already searching for. With more than 30 three- to four-minute videos in the series, it has already garnered almost five million views.

The DreamWorksTV strategy is to build robust play lists, create programming that is search-friendly, and closely follow and respond to viewer habits—which seems to be the

winning strategy on YouTube. You have to cater to viewers' interests, but stay out of their way as much as possible.

"We don't want to frustrate the viewing experience," agrees 9 Story Media Group digital sales manager Elianne Friend. "We want to give our viewers what they want."

The Toronto-based production and distribution company currently has 24 channels on YouTube, broken down by brand and language. Each grew organically over time, with plenty of learning as they went along.

"We understand our business a lot better now," says 9 Story MD Natalie Osborne. "We understand what's happening in territories a lot better, because sometimes it's really hard to find ratings. It's hard to know what's happening with your brand in certain territories. But with YouTube, you get real-time data—we understated that in Mexico or Indonesia, for example, certain content is really connecting with audiences there."

Case in point: After seeing interest in their brands piqued in Latin America, the company developed neutral Spanish and Brazilian Portuguese channels, led by viewer favorites like *Wild Kratts* and *Daniel Tiger's Neighborhood*—the latter of which is not even on broadcast in the region. It then leveraged that viewership to roll out smaller series like *Joe and Jack*.

One of the critical lessons was found in understanding how linear broadcast and YouTube can mesh. "It may seem counter-intuitive," says Friend. "If we have a show on television, why would we put it on YouTube? Wouldn't that cannibalize the views? But it actually complements it. We've seen this across the board."

"In fact," adds Osborne, "what we're finding is that there's a strong correlation between what's doing well on air and what's doing well on YouTube. YouTube helps market

Q&A: Early learning with MCN Frederator Networks

“We are about one inch along on a 100-foot ruler,” says Frederator chief Fred Siebert of the growth of online video. “We still have a lifetime to go.”

Despite only having one head, Fred Siebert wears many hats. A longtime veteran of the radio and TV world, he is currently founder and CEO of Frederator Networks and Thirty Labs—an incubator that builds new products and applications, with a focus on new video technologies and strategies.

Siebert founded Frederator in 1998. Along with producing several hit cartoons for linear TV like *The Fairly OddParents* and *Adventure Time*, the company has spawned online animation-focused networks Channel Frederator and Cartoon Hangover, among others.

Now as an MCN, Frederator is a community for animation and entertainment professionals who create, cooperate and maximize their content and presence on the web. It currently distributes well over 1,000 YouTube channels from 2,000 creators to 28 million subscribers—representing 385 million monthly views and over four billion cumulative network views. Moreover, it offers support and training to members, helping them attain their goals, whatever they might be.

Kidscreen sat down with Siebert and Matt Gielen, director of programming and audience development at Frederator Networks and Cartoon Hangover, to find out if sleep is even an option at this point.



Fred Siebert and Matt Gielen share their YouTube know-how

What ties Channel Frederator Networks together?

Siebert: The popular word a lot of people use now is curation—but I came out of popular music radio. If you think about it, a radio station curates all of the records available...Then they put together a mix that will make listeners happy.

We realized that there were a lot of animated films out there that we thought were really wonderful, and the only place we saw them was at festivals. So, we decided that our first play was to find emerging talent and give them an audience.

It's progressed over the years: How can we make things for that audience? How can we curate things for that audience? How can we package things for that audience...so that in a world of real chaos, they can find their way to the things they are in love with?

Where does the audience fit in to all of this?

Siebert: The audience is always the most important part and—especially with traditional broadcasters—the part that is taken most for granted. But as far as we are concerned, we're all in this together. The only difference between us and the audience is we happen to be hosting.

Our job is to communicate what it is we're doing—and we are perfectly willing to not have most people interested in what we do. We're here for the people who are interested. And if we have done our job right, we've gathered up the right engaged group of people who want to be there, and not people who ended up there by accident.

In every medium—whether it was radio in 1927, or television in 1957, or cable in 1987, or the internet in 2015—every medium has challenges gathering audiences. Sometimes there is technological help. Sometimes there is scarcity help—in the early days of television the average home in America had two channels. But in every medium at every stage in every era, there are tricks of the trade.

For years, how often would you hear the term ‘viral video’? Our first big success on channel Frederator was called *Internet People!* What creator Dan Meth did was shout out every viral video star through a really catchy song and a little animation of that star. It flew around the internet the first afternoon because everyone was interested in these new stars.

That wouldn't work so much today. Today, you would have to have an animation of Donald Trump up on the air in order to have that kind of success. So the rules and the tricks of the trade have changed. It's much harder now. It is almost impossible to have a viral hit in the way you did in 2008.

How do you make it so viewers can find what they love?

Gielen: In our view, there are three main ways people discover videos on YouTube—one is human-driven; one is YouTube- or algorithm-driven; and the other is paid.

Human-driven combines a number of factors—people searching, people talking to each other, people sharing on

social, and those kinds of means. Algorithm-driven is when YouTube says it is going to put your video in related videos, or in What to Watch as a way of suggesting to people that they should watch your video. The third way is paid media.

Siebert: You're missing one: Put a cat in your video.

Gielen: OK, the fourth bucket is cats. Cats are the fourth bucket. We really focus on working with our creators on the first two—human- and algorithm-driven viewership, and all the various methods of influencing people to share, engage with and search out your content, and then influence the YouTube algorithm to program your content within their site.

Is there a logic to how viewers navigate YouTube and online content now?

Gielen: It's now more about community—groups of people who are looking for connection with other like-minded people. We are starting to see more and more community happening around particular creators, channels and brands, where they are feeling a part of something bigger than themselves. In the early days of YouTube, we saw it around vloggers, who would create communities around themselves and would have their own lingo and that sort of thing. Now we are starting to see that shift over to programming and show-type formats as well.

One of the things we hear and see quite a bit in our comments, and that starts showing up on Facebook and Twitter, are quotes from [Cartoon Hangover's] *Catbug*—like 'Sugar Peas!' and 'Throw a blanket over it', or 'Build a little fence around it'—the language that people use creates that kind of community feel and the idea of secret knowledge.

I think the concept of YouTube is still very much alive and well. A lot of it skews younger, in the 10- to 18-year-old range, where I think people would identify as a YouTube viewer—they know the big vloggers, they know the big themes going around, they consume the majority of their content on YouTube versus in a theater or on TV, and they feel a part of that community.

How do you define success for any given channel?

Siebert: It depends on your film and who it is meant to serve. When Dan Meth made *Internet People!*, he wanted a really big audience. But his biggest video before that was commissioned for a group for synagogues around New York. They said: 'We need young people to be more engaged in Judaism.' So he made this fantastic video called *Hebrew Crunk* where he took Lil' John and put him together with a rabbi, and he wrote a rap that incorporated a kind of Jewish Klezmer music in it. I think he got about half a million views inside of one week

when he posted it around the high holidays. The rabbis were thrilled beyond belief because 500,000 was probably about 495,000 more people than they ever imagined would look at what Dan gave them.

So ambition really affects what you make, how you make it, how you post it, how you promote it, how you draw it, what kind of soundtrack you use for it—there are a million factors that go into the audience paying attention. We try to give filmmakers a variety of approaches that fit with their personal ambitions. And believe me, having talked to literally tens of thousands of filmmakers over the years, not everyone's ambitions are what we assume them to be.

Where are we in the evolution of the medium—both YouTube and online video?

Siebert: I think in the online video universe, we are about one inch along on a 100-foot ruler. We're really in the earliest days and we still have lifetime to go. There is a lot of growth to be had in that world. There are only a billion people who watch YouTube—there are seven billion people on the planet—it has a lot of headroom to go. But in online video, we have barely scratched the surface.



Cats remain a YouTube staple, and new Frederator preschool channel Fredbot is on-trend with Korean series *Pom Pom & Friends*

digital directions



Daniel Tiger's Neighborhood distributor 9 Story Media Group looks to its YouTube channels to introduce series to new regions

and promote, and what we're doing is actually pushing viewers back to the linear broadcaster."

"Cross-promotion and leveraging our brand helps break through the noise," Friend says. "But also, by using those analytics and seeing where the demands is, you know that even in a crowded territory—where you may not have launched an unknown brand before—people are trying to get their hands on good preschool content. We can go after that market."

Looking for help?

YouTube Creator Academy & YouTube Certification

Launched in 2014, the YouTube Creator Academy delivers online learning for creators, while YouTube Spaces offer additional in-person resources in New York, London, Tokyo, Los Angeles and São Paulo.

The YouTube Certified training program offers opportunities for professionals to learn channel management best practices to help them find success through online and in-person events. Courses include Creator Strategies for Sustainable Viewership, Audience Development Strategy and Methods, Google Sales, Monetization, Copyright and many others.

YouTube Partner Program

The YouTube Partner Program shows creators how to monetize content in several ways, including advertisements, paid subscriptions and merchandising. Some minimum requirements must be met to join the program.

9 Story has also used YouTube to give new life to its library content, like when it relaunched '80s hit *The Elephant Show* on a YouTube channel. "The kids who watched it then are now parents, and recently the show was in the news," says Osborne. "So, you could see the renewed interest and people searching for it."

The fact that a 30-year-old show can still resonate with YouTube viewers highlights one of the most important lessons when it comes to the platform—good content can be old, new, short, long, factual, silly, weird or a million other things. Good YouTube content is entertaining—however an audience defines that.

The more complicated question gets raised in deciding how much content is enough.

"We don't constantly refresh, especially in the kids space," says Friend. "Kids like to know that the episode they saw yesterday is going to be on there tomorrow. An element of repetition, for kids at least, is something incredibly valuable."

"We try to keep evergreen episodes up on the channel, but based on that we do mash-ups, song medleys and compilations to keep the channel fresh, to keep the content engaging and also to keep parents happy. If it's not on your channel, they might go after the pirated stuff, so we try to provide content that is high-quality, safe and represents our brand well."

"Ultimately, our goal is to make sure that every day there is something new for the audience we're trying to reach," offers DreamWorksTV's Rawlings. "Something original and something new. Some days, that might mean four pieces of content. Some days it might mean one. But the goal is just to make sure that our audience, whenever they are coming to check things out, feels like there is something they haven't seen before."

The full lifecycle

YouTube now touches every aspect of the industry. Its influence is even being felt at retail. “YouTube is so integral in building global brands, and it has so many different dimensions as to how it touches our business, from both the trade and consumer perspective,” says Richard Goldsmith, EVP of global distribution and international consumer products at The Jim Henson Company.

Henson runs two YouTube channels—The Jim Henson Company (home to all of its content, including sci-fi and fantasy and videos about the company itself) and Jim Henson Family TV (which features all of its family-friendly content). There, viewers can take in full episodes, playlists and much more, with shows like *Sid the Science Kid*, *Fraggle Rock*, *Pajanimals*, *The Wubbulous World of Dr. Seuss* and many others.

Goldsmith says Henson content basically falls into three buckets—library content, current series (Henson currently distributes seven preschool series on YouTube) and original programming for the platform, a bucket likely to get larger as time goes on. In fact, Goldsmith says the company looks at YouTube as a partner like any other TV network, and talks to its execs during the early stages of any big project.

YouTube is already paying off in tangible ways, he says. Take *Dinosaur Train* as an example. In Russia, the show is on national kidcaster Carousel, and there are more than 200 consumer products SKUs available at retail regionally.

“But what our team in Russia advised us,” says Goldsmith, “is that you cannot be a successful children’s brand in Russia by merely being on television. You have to have a strong YouTube presence as well. So we spent significant time researching who the best partners were in Russia, and *Dinosaur Train* was put on YouTube. It did very well from a viewing perspective, and now we’re going to expand it dramatically.

“The market told us that you can’t be a successful brand without being on YouTube—so we were. And the results were far greater exposure that translated into greater consumer products sales.”

Learning to listen is vital, but so too is working with the right people. “If you have ever tried to set up your own YouTube channel and really take advantage of all the bells and whistles and what it can do—it’s really difficult to do as an amateur,” he says. “You need people working with you who understand the ecosystem—who understand how to operate your channel, who understand posting, and how to communicate with your fans, who understand how to use the data. You need people working with you, either inside the company or out, who really get it.”

And they have to be humble enough to let the market guide them as they go along.

“I feel like I’ve learned something new every day,” admits DreamWorksTV’s Rawlings. “We’re in the Wild West of the shift to digital, non-linear content and consumption. I’m learning at the same time as the rest of the industry and our audience, as they figure out how they want to consume.

“You’re riding a surfboard and the wave keeps shifting. It’s what makes it daunting and fun at the same time.” 📺

Tips from the top

YouTube’s global head of family and learning Malik Ducard shares three best approaches

When it comes down to it, YouTube is a nascent platform, churning with new innovations and influences. Because of that, Malik Ducard, global head of family and learning, tends to avoid the word “rules” when it comes to launching YouTube channels.

“All of the best practices come from the creators themselves,” he says. “They come from them not having or following a specific blueprint. Just because it has worked this way before doesn’t necessarily mean that for another creator it will work that same way again. Some of the best practices come from creators who didn’t follow the best practices. It’s a dynamic platform, and I think there’s a lot of opportunity for creators to really apply their creativity.”

But there are a few basic approaches he recommends:

Focus on building a subscriber base

It’s important to keep viewers returning, and the best way to do that is by getting them to click “subscribe.” Getting them to do that represents a huge shortcut, as they are notified each time new content is uploaded. “From a content producer standpoint, you don’t have to go out and rediscover, re-find or re-identify that user every single time you have something great you want to share,” observes Ducard.

Focus on a specific target

Ducard advises that channel creators identify a specific target or viewer that they are trying to appeal to and stick with it: “YouTube has a lot of users and it’s a global platform, but I think what resonates is really appealing to a specific fan base. There are many deep columns of rabid fans who love a certain type of content, and are looking for a certain type of experience throughout YouTube.” If you keep your focus tight, fans with particular tastes or interests will invest more deeply in it.

Stick together

“YouTube is an incredibly collaborative space, and there’s more benefit to working with another person who is in a nearby category or the same category,” he observes. “There is more headroom—more space to grow—for both parties in partnering up than there is in looking at that person or that channel as a competitor or ‘the anti.’ Algorithms really support the coming together and the collaborative nature of creators and digital in general.”



YouTube’s Malik Ducard



Measured optimism

A strong currency, pre-recession GDP and bolstered consumer confidence have put the kids merch market back on track in the UK

BY PATRICK CALLAN



Star Wars fever has hit UK retailers and should further boost already solid merch sales

On the strength of the British Pound, the UK has weathered the recent economic storm in Europe and surfaced as one of the world's leading markets for licensed kids merchandise. For a region generally known for wry cynicism and restrained enthusiasm, many UK licensing industry insiders have, of late, been singing the praises of the local licensing market. And a look at some recent stats will tell you why.

The UK's licensing industry, the third-largest market for licensed kids goods behind only the US and Japan, is seeing an impressive resurgence, particularly in the character/entertainment category. According to LIMA's first-ever global licensing industry study, character/entertainment licensing in the UK now accounts for a whopping 64% of the region's total licensing industry—or US\$7.67 billion in retail sales. That's more than double the share licensed character/entertainment merch claims in the US (31%) and well ahead of the global average of 44.4%.

In addition, recent data from market research firm The NPD Group places the UK in a dead heat with Belgium for the second-highest growth (13%) in licensed toys from May 2014 to April 2015, behind only Mexico at 15%. "Overall, the economy is doing very well. GDP is back to pre-recession levels, job levels are strong in the UK, and more importantly, I think people are feeling more confident," says Rob Corney, group managing director for Kent-based Bulldog Licensing.

What's trending

In terms of what properties are spurring growth, major stakeholders in the UK character/entertainment industry mentioned two factors time and again—films and nostalgia.

"Nobody would touch film five years ago," says Gurdev Mattu, MD at Leicester-based apparel licensee Fashion UK, whose portfolio includes Angry Birds and Paddington Bear. "Frozen, Despicable Me and Minions have really changed that."

Indeed, *Minions*, the Despicable Me spin-off starring the cute yellow evil-villain underlings, knocked Frozen off as the top toy license in the UK the week before the movie launched there on June 26. Frozen had owned the top spot since July 2014.

"Without a doubt, Minions is the hottest license at the moment, I think on the planet, nevermind the UK," says Stephen Gould, UK MD at London-based licensing agency CPLG,

which manages Minions in the UK, as well as brands like In the Night Garden and Skylanders. "At CPLG, we've never seen anything as big as this, and we've had some big brands historically, like the original Star Wars in its heyday."

Tim Kilby, brand director at Cheadle-based home textile and accessory company Character World, says movies seem to be the driving force at the moment in terms of making a quick win for retailers across many different categories. "And it's not just the theatrical releases—you've got the home entertainment DVD and Blu-ray, so it's like two bites of the cherry," he says.

Kilby adds that with the highly anticipated *Star Wars: Episode VII—The Force Awakens* hitting theaters this December, retail penetration will be at an all-time high for Star Wars products to drive footfall.

Just as iconic franchises like Star Wars return to the big screen, other British classics like Thunderbirds, Danger Mouse and Teletubbies are ramping up for a comeback on the small screen.

"Maybe that points to the fact there's a little bit of caution possibly around some of the entertainment considerations and purchasing decisions," says UK-based Tom Roe, commercial director of DHX Brands, the brand management and consumer products arm of DHX Media. "A lot of these very successful and nostalgic properties from years gone by have been brought back with varying degrees of success, it would appear, so far."

Nonetheless, Roe has high expectations for DHX's *Teletubbies* reboot, which returns to air on British pubcaster CBeebies this fall featuring familiar characters Tinky Winky, Dipsy, Laa-Laa and Po. The property has a raft of international broadcasters lined up (Nick, Family Jr., GULLI, Rai) and master toy partner Character Options in place. "We're bringing back Teletubbies, although we're doing it in a very different way, which includes a completely new audience. It will effectively be a new show," Roe contends.

However, when it comes to nostalgic properties, it's not a good idea to stray too far from what people have become accustomed to, according to CPLG's Gould. When it comes to a brand like Care Bears, he says UK retailers like Mothercare (which specializes in products for moms-to-be and kids under eight) want the old imagery that today's parents and caregivers grew up with.

"That's where the emotional connection is," he says. "Brands that seem to be prepared

to be more creative style-wise when it comes to older imagery—that's what's working."

But it doesn't end with good creative and artwork. Retailers also want to see brand support from licensors to it alive and fresh in the minds of consumers, beyond just the TV show or movie, Gould adds. "They're looking for the whole social media aspect of things, POS, cross promotions, and they absolutely love live events," he says with emphasis. "Whether it's an in-store promotion or something as simple as a costume character appearance—they cannot get enough of them."

Lay of the UK retail land

Tracy Griffiths, FremantleMedia VP of licensing and consumer products for EMEA and Australia, agrees with Gould. "There is a strong appetite for licensed products and cross-category promotions at retail."

Without a doubt, the UK's retail landscape is one of the most developed in the world for licensed kids entertainment merchandise, but having such a high level of sophistication has its drawbacks, says Bulldog's Corney.

"Entrepreneurialism is lacking at UK retail," he says, explaining that retailers in continental Europe are often more willing to partner on promotions like giving a gift with a minimum purchase. "It's almost impossible to run those promotions in the UK because of things like club cards and loyalty programs. The data they mine from them is phenomenal, and they target people closely with their offers."

Some of the biggest UK retailers mining that data are grocers such as Walmart-owned Asda, Tesco and Sainsbury's. Another good way to get your brand in front of a swath of potential customers is to partner with leading shopping centers like Intu, adds Griffiths.

As far as catalogs go, Argos—with its 740 stores—is the leading retailer and key driver for toy sales, with many campaigns starting after its seasonal catalog has launched. The Entertainer (100-plus stores) and Smyths (80 locations) have both been growing their store numbers year-on-year and are becoming a key part of any retail plans when launching toy-driven brands, Griffiths says. And of course, Toys 'R' Us is still very prominent across the region, with 85 outlets.

Other key mid-market players include the likes of Next, John Lewis, HMV and Marks & Spencer. As for independent stores, many are affiliated with Toymaster, an association that provides marketing and purchasing support to its more than 250 member toy shops.

On the fashion front, having a high-volume retailer like Primark (which has 270 stores in nine European countries and just opened its first US store in downtown Boston) on board is important to any campaign. And on the discount side, there's Poundland (590 stores), B&M (450 shops) and Home Bargains (370 locations), all of which are becoming increasingly developed in licensed kids products.

The growth in discount retailers is an offshoot of the global economic recession of 2008-2009, contends Bulldog's Corney. He says at the height of the tailspin, retailers and licensees were taking refuge in what they considered "safe bet" brands, like the Disneys of the world. It flooded the market

with tired creative, he explains, as everyone was doing the same thing in slightly different ways. But now that the UK's economy has recovered and consumer confidence has started to pick up again, retailers are willing to take on more risk, and in fact, are actively looking for points of difference through licensing.

Case in point—Shopkins. As one of the hottest girl-skewing brands on the global kids market, Bulldog reps the property in the UK. Since launching last June, the IP from Australia's Moose Toys has sold well over 70 million units worldwide. Toronto, Canada-based Nelvana is also turning the grocery-themed collectibles into an animated TV series slated for spring 2017.



BEST SHOPPING PERIODS IN THE UK

The busiest and most competitive shopping period for kids products in the UK is definitely Christmas, according to VIMN's VP of consumer products for UK and Ireland, Mairanne James. But Easter and summer are also very important as they coincide with school holidays, she adds.

In recent years, the American tradition of Black Friday—and its newer online companion Cyber Monday—have caught on in the UK, says Emma Weber, international licensing director at toyco Vivid Imaginations. "The peak in sales historically was as late as week 51, whereas in recent years, this has shifted earlier to weeks 48 and 49 due to these retail events," she notes.

FremantleMedia VP of licensing for EMEA Tracy Griffiths says for toy retailers, the run up to Christmas is the golden period. Q4 traditionally accounts for 50% of annual toy sales, with volume increasing and reaching a peak the week before Christmas. She adds that back-to-school and Halloween are also busy periods, while January has been picking up of late, with more and more children buying toys with their Christmas money.



Hot property Shopkins is getting the cross-category treatment from UK retailers

"We've had meetings with all the major retailers and we've been going into rooms of 14 and 15 buyers from different categories, as well as marketing people, who all want to find ways to better work together to make this brand as big as it can possibly be for all stakeholders. That's a new trend," Corney says.

When talking about retail, while bricks-and-mortar is still king, UK retailers of all shapes and sizes are continuing to expand their digital reach and offerings in order to keep up with the likes of Liverpool-based online retailer Shop Direct, which does 86% of its €1.7-billion (US\$1.92-billion) business on the web.

Marianne James, Viacom International Media Networks VP of consumer products for UK & Ireland and European retail sales & marketing, adds that e-commerce continues to grow with many retailers focusing on their online and digital strategy across multiple platforms such as laptops, tablets and mobile. "Social media is also a key focus for retailers, as this is ever-growing in its importance to reach and connect with target audiences and customers," she says.

FremantleMedia's Griffiths asserts the growth of online retail has forced high street bricks-and-mortar retailers and shopping centers to become more inventive. In some cases, they've started pooling resources in order to lure shoppers into their stores. For example,

Argos teamed up with Sainsbury's to open new Argos digital stores within 10 of the grocer's locations over the summer.

British royalties

Whether for digital or physical retail, the general consensus in the UK entertainment licensing business is that licensees can expect to pay royalty rates of roughly 12%. However, Bulldog's Corney cautions that figure should be taken with a grain of salt, since royalty rates can be category-specific. Whereas master toy licenses can fall in the 10% to 12% range, he's seen digital command 45% to 50%, while commodities like confectionery can be as low as 4%, but more commonly sit around 5% to 6%. At €5 billion (US\$5.65 billion), the UK's confectionery market is significantly larger than its €3-billion (US\$3.39-billion) toy market.

CPLG's Gould agrees with 12% as a rule of thumb for royalty rates, adding it can fluctuate anywhere from 10% to 14%. But when it comes to minimum guarantees, it's virtually impossible to pin down any kind of regional standard. Whereas the MG for a brand-new property in the UK could be US\$5,000 to US\$10,000 untested, a recognizable brand that is also performing well could command up to six figures.

Unsurprisingly, the hotter the property, the higher the royalty rates it can command. This is especially true when it comes to licensors in the music industry. Fashions UK's Mattu says for

some of the bigger names, his company could end up paying as much as 40% in royalties, but those tend to be one-offs. "Maybe they think they've got a short shelf life or want to milk it, or are just used to earning huge royalties out there in their music empires, so they want the same out of the rest of the consumer products," he says.

Fair trades

Royalty rates aside, there's a larger economic factor to consider for UK entertainment licensing market players—the free movement of goods clause in the 1957 Treaty of Rome (which established the original European Economic Community) that prevents anti-competitive behavior. "I think it's something all licensors need to be aware of," says Corney. "For instance, you can take a UK license for product X, but you can't actively sell it into France. However, if a retailer in France wants to buy it from you, and they approach you unsolicited, then you are entirely within your rights to sell it to them."

It's not something that causes too many problems within Europe, he concedes, but it does come up a lot with North American or other international licensors, who are sometimes surprised to find their products selling in territories where they weren't expecting them to be. "We do get a lot of phone calls from irate licensors," he says. "Occasionally it puts licensees in a tough position when a licensor doesn't under-

stand the implications of the Treaty of Rome and puts pressure on them to not supply outside their territory."

One of the biggest challenges this creates is when licensees grab a license for very beneficial terms in a smaller territory, knowing full well they can effectively turn around and sell the products into the rest of Europe. Despite the strict non-solicitation clause, Corney says it's easy enough for licensees to skirt the legislation by claiming they were just showing the products in their showroom when along came a retailer from outside their territory.

"The area where licensors need to be most aware is when they're dealing in territories that have much softer commercial terms, to make sure those terms are very specific to that territory so that the licensee isn't trying to find a back door to take a pan-European license," he says.

DHX's Roe says licensing programs across Europe will often vary from one country to the next. For example, its Teletubbies licensing program in France will be very different from the one in the UK. "We'll have several partners who will go across the region, such as Character Options and Egmont, but there'll be a lot of local partners," he says.

Like Corney, Roe says if local partners don't stick to the parameters of the licensing agreement, it can put the brand owners on very shaky ground legally and lead to other problems. If DHX has a clothing partner in Germany, for example, and a different partner in Spain, and then one starts cutting into the other's territory, it will have a huge negative effect on that local partner's business.

"You need to rely a little bit on decency and people being honorable. We try to work with best-in-class partners who will respect the rules of the game," Roe explains. "If you're working with someone who you've worked with several times in the past, and who you know will want to work with you in the future—someone who you will be having renewal conversations with every two to three years—that's when the honorable behavior kicks in."

The road ahead

Despite this grey area, there remains plenty of optimism and confidence that the UK's entertainment licensing industry will ride its current hot streak for the foreseeable future. However, due to the nature of the cutthroat retail industry, there's certain to be some challenges along the way.

For one, securing shelf space for a brand-new property that is not linked to a powerhouse global toy company or studio can be a daunting task, according to FremantleMedia's Griffiths. "With the proliferation of theatrical releases from studios such as Marvel and Pixar gaining global success, there is even more competition for companies looking to licensing and merchandising to help finance their content investments," she says.

However, she notes her company has also picked up on retailers' preferences for familiar brands, which is why she believes there is huge opportunity to build on the awareness and appetite for Danger Mouse, in terms of both the classic and new lines. The Danger Mouse reboot premieres on CBeebies this fall in the UK before a global rollout next year. Key licensees so far include Jazwares (master toy) and Penguin (book partner for English-speaking territories outside North America).

From a licensee perspective, UK Fashion's Mattu says simply acquiring licenses has become harder, and currently he's not only dealing with other licensees as competitors, but also with licensors and retailers as they delve into direct-to-retail deals.

For brand owners like DHX, Roe says with only so much shelf space to go around, and so many strong brands on the market, the competition is more intense than ever as brands are being backed by huge amounts of capital in an effort to make them stand out.

On the licensing agency side of things, Corney says outside of securing physical retail space for products, one of the biggest challenges is making sense of all the crazy statistics floating around out there, particularly for digital properties. "If you've got two million downloads, that's great, but how many people are actually using it?" he asks. "You have to be very honest with people and say, 'These are the people who are actively engaging with the brand and these are the reasons why we think it's licensable.'"

Corney adds that for two or three years when the app world first took off, many in the UK entertainment licensing industry tore up the rule book and forgot the basic rules of licensing, like considering entry price-points and whether or not the brand was scalable across categories.

"A lot of things came to market that were never going to work, and a lot of very credible brands are now struggling to break in because of that heritage," he says. "But it will go. People have woken up to the fact that you have to have the intrinsic pillars that make a brand a brand." 



TOP FIVE UK TOY LICENSES

1. Minions
2. Frozen
3. Star Wars
4. Peppa Pig
5. Marvel

(Source: The NPD Group, June 2015)



Revving up for Brand Licensing



As the UK market kicks into high gear, property owners ready their wares for Europe's biggest licensing event

BY GARY RUSAK

Noddy, Toyland Detective

Property owner/licensor DreamWorks Animation

Synopsis English author Enid Blyton's classic publishing property Noddy in Toyland debuted in 1949. Instead of easing quietly into old age, however, the wooden boy is back with a fresh new look. Toyland's most beloved resident returns in a 52 x 11-minute series from Gaumont Animation that reimagines the beanie-headed boy along with old friends Big Ears the dog, and Revs the car. Noddy now fancies himself a gumshoe, investigating the world and solving mysteries in each episode. With an updated look that features sneakers, instead of wooden clogs, the CGI series *Noddy, Toyland Detective* is set to bow this fall.

Licensing plans and launch With a target demo of three to six, the licensing program will focus on toys including figures, playsets and vehicles in the first wave. Other targeted categories for the fall 2016 launch are games, publishing, apparel and accessories.

Current partners Toyco Spin Master has already signed on as global master toy partner, while Hachette has snapped up publishing rights in France, with plans for products including magazines and activity books.

Open categories In France, DreamWorks will be looking to lock down outdoor (excluding wheels), construction and ELAs. In the UK, open categories include health & beauty, games and puzzles, ELAs, food and confectionery.



The Secret Life of Pets

Property owner/licensor Universal Partnerships & Licensing and Illumination Entertainment

Synopsis The fifth big-screen collaboration from the partners who created the successful *Despicable Me* franchise lifts the veil on the lives pets lead when their owners are not around. With comedy heavyweights like Louis C.K., Eric Stonestreet and Kevin Hart making their animated feature-film debuts alongside *Despicable Me* director Chris Renaud, it is not hard to see why the buzz is already strong for the film that is set for a global theatrical release next summer.

Licensing plans and launch The licensing program will focus on the pets and is a natural for the traditional plush and figurines categories. The first line of toys is expected to hit global mass retail in May 2016.

Current partners Spin Master holds global master toy rights. In addition to traditional plush and figurines, the toycos will develop interactive and motorized toys that bring the pets to life in unexpected ways. Just like the film's characters, the toys will range from cute and cuddly, to feisty and irreverent.

Open categories Universal and Illumination will be looking for a number of different category partners to support their big toy plans and are using Brand Licensing to scout out global partners in apparel, publishing and stationery/social expression.

Thunderbirds Are Go

Property owner/licensor An ITV Studios and Pukeko Pictures production, in association with New Zealand-based Weta Workshop. The series is distributed and licensed internationally by ITV Studios Global Entertainment.

Synopsis The iconic mid-60s marionettes are back in the rescue business. From their secret island base, this family of highly trained responders can reach every corner of the globe—and beyond—in minutes. The Tracy clan, head of security Kayo, lead engineer Brains and a slew of futuristic vehicles debuted their new look this spring in the UK, Australia and New Zealand. A second 26 x 22-minute series is currently in production.

Licensing plans A mass retail licensing program has already started rolling out in the UK, led by toys. Other key categories including apparel, homewares, gifts and publishing will follow. Products are also expected to hit Japan, France and the Middle East throughout 2016.

Current partners There are currently more than 40 worldwide partners on the brand's extensive licensing roster covering all key categories. Along with master toy partner Vivid Imaginations, licensees include Spin Master (toys), Kids@Play (inflatable rockets, ball parks and pools) and Simon & Schuster and DC Thomson (publishing).

Open categories Exploring the IP's promotional and digital potential is a top priority for BLE. As well, the team will be looking to leverage the series in multiple territories around the globe.



Ice Age: Collision Course

Property owner/licensor 20th Century Fox Consumer Products (FCP)

Synopsis: The multi-billion-dollar Ice Age franchise can rightly claim to be the undisputed animated film franchise champion of the world. The fifth big-screen edition for the mammoth brand will hit theaters in every corner of the globe on July 22, 2016. Plot details are still under wraps, but the entire original cast, including the well-known voices of Ray Romano and Queen Latifah, will be back for another outing of chuckle-inducing adventures.

Licensing plans and launch The successful Ice Age licensing program was built upon toys, apparel, stationery, publishing, back-to-school and food & beverage. With those programs ticking along, FCP is now concentrating on its successful live show *Ice Age Live! A Mammoth Adventure*, as well as theme park attractions in Europe and Asia.

Current partners In addition to a long list of Ice Age franchise partners, new EMEA partners signed for the fifth movie include Famosa, Gipsy (toys), Neco Dis (plush) and Dromader (construction sets). Apparel and accessories partners include Lucien Colas, Orbital Teknoloji, Aydogan Orme Tekstil, Paso Polska, United Labels and Rainbow Max for the Middle East. Tent-pole partner X5 Retail Group is continuing to expand its mass-market range of food & beverage and personal care products across EMEA.

Open categories The ever-expanding franchise still has regional opportunities available in a number of major categories including gift & novelty, homewares, stationery, back-to-school, health & beauty and publishing.



Wissper

Property owner/licensor m4e AG, Absolutely Cuckoo, Telegael, Discreet Art Productions and Bastei Media. m4e is handling the property internationally as licensor.

Synopsis The titular character of the 52 x seven-minute CGI series is a seven-year-old girl who was born with the magical ability to communicate with animals. Wissper's on a self-appointed mission to help her animal friends wherever they are—in the jungle, desert or ocean.

Licensing plans and launch The driving categories for this new IP are publishing and toys. The foundational partners were on-board early enough to have a chance to contribute to the character development and design of the series. With Wissper debuting on-air this fall, the licensing program is still in its infancy, but the overall strategy will pursue selective expansion in territories with broadcast agreements.

Current partners Erfurt, Germany-based Bastei Media is a co-production partner that also holds the publishing rights for the IP, along with Bastei Lübbe. As well, the company will handle the development and distribution of apps. Global toyco Simba Dickie Group has signed on as the master toy partner. In the UK, Channel Five's Milkshake is on-board as commissioning broadcaster.

Open categories After the initial phase, the partners will focus on extensions in home entertainment and toys. Other priority categories include apparel, shoes, accessories and back-to-school.

Morph

Property owner/licensor Aardman Animations

Synopsis The late Tony Clark's classic Claymation character made its return to UK television after a successful Kickstarter campaign showed that audiences had not forgotten about the cheeky little fellow. A new 15 x 90-second stop-motion series started rolling out on UK pubcaster CBBC in June.

Licensing plans and launch With the goal of reintroducing the IP with a brand-new style guide for a four to 11 demo, Aardman is targeting toys, arts & crafts, stationery and gifts as driving categories. Retail focus will be on the department store tier, along with toy stores, specialty arts & crafts and online retailers.

Current partners The first product in the relaunch is UK-based toyco Flair's Make your Own Morph Plasticine set. Additionally, UK-based Francis Lincoln Publishers has signed on to produce Morph notebooks.

Open categories The focus during BLE will be on finding partners in the toy, gifts, stationery, apparel and publishing categories.



Bing

Property owner/licensor Acamar Films

Synopsis Based on the book series by Ted Dewan, this 78 x seven-minute CGI preschool series follows the everyday adventures of the titular bunny Bing as he navigates the ups and downs of life at home and at school, along with his friends Sula and Pando and his cousins Coco and Charlie. The series debuted on CBeebies last June and has also been picked up by ABC in Australia.

Licensing plans and launch The driving categories are toys, publishing and home entertainment.

Current partners Harper Collins (publishing) and Egmont Magazines (magazines) have signed up in the UK, and Studiocanal has already launched a line of DVDs. Fisher-Price, meanwhile, is global master toy partner, and the first full range of toys launched in the UK this summer. Other partners include Woodmansterne (greetings), Rainbow (costume characters) and Ravensburger (games). A number of new deals have also been signed through Australian agent Merchantwise, including Caprice (clothing and accessories), Network Clothing (bedding) and Entertainment Store (live shows).

Open categories The next phase will include expanding beyond the core categories with a focus on character-based extensions.



Care Bears

Property owner/licensor American Greetings Properties

Synopsis The bears are back with a 26 x 12-minute animated Netflix original series *Care Bears & Cousins*, which is set to bow globally on the streaming service in November. The series will feature the original group of well-known bears (plus the debut of Wonderheart Bear) along with an array of new characters.

Licensing plans and launch AGP will leverage the new global launch to strategically expand the existing consumer products program with driving categories such as toys, publishing, apparel and back-to-school hitting global mass retail early next year.

Current partners Just Play is master toy partner, and along with distributors such as Vivid and Giochi Preziosi, the toyco has been successful in getting Care Bears goods on mass-market shelves in 45 countries in North America, Europe, Latin America and the Middle East. In the last 10 years, more than 100 million Care Bears plush have been sold. Vivid launched new Care Bears toys in the UK and France this spring, and has lines of sing-a-long plush earmarked for both territories this fall. As well, a partnership with retailer Build-A-Bear Workshop will fill the DIY category. This fall will also see the global rollout of the Ubisoft-created app *Care Bears Belly Match*.

Open categories While the roster is robust, AGP will be using BLE to further develop the Care Bears program with a global approach in various categories including toys, digital apps, publishing, apparel and accessories.



Mister Maker

Owner/licensor Zodiac Kids

Synopsis Mister Maker is returning next spring with the 26 x 20-minute *Mister Maker's Arty Party* on CBeebies, which focuses on the interaction with the Mini Makers. A bevy of surprise guests will also spice up the arts & crafts-based series.

Licensing plans and launch An updated style guide will be implemented program-wide for the new series. Of course, arts & crafts will remain the driving category, while live events and promotional partnerships will also be part of the picture.

Current partners The current licensing roster includes Creativity International, P2, Igloo and Immediate. Evolution Productions have started production on live events, with a planned UK-wide tour of 100 shows that will continue into spring 2016.

Open categories After the success of the Our Make and Bake product line from Kerry Foods, Zodiac will be looking to expand in the FMCG category. And given Mister Maker's high-level of parental engagement and trust, promotional partnerships are also a natural category for the brand.

Shimmer and Shine

Property owner/licensor Nickelodeon & Viacom Consumer Products (NVCP)

Synopsis The colorful girl-focused 20 x half-hour series debuted in August on Nickelodeon and follows fraternal twin genies who good-heartedly create chaos and clean up messes while granting wishes for Leah, their human BFF.

Licensing plans and launch The program will launch internationally beginning with Canada in fall 2016 and all other territories in fall 2017.

Current partners Fisher-Price is the master toy partner.

Open categories The fledgling program will initially focus on toys, publishing, apparel, accessories and DVDs.



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Splash!

Owner/licensor The Jim Henson Company

Synopsis It's still early days for this brand-new IP, but its nautical namesake preschool series is aimed at kids four to seven and will feature the comedic adventures of a number of those wild and wonderful inhabitants of the sea. The titular character is an inquisitive yellowtail fusilier fish who explores his Reeftown neighborhood with a number of friends and neighbors.

Licensing plans and launch The series is expected to debut in the US in 2016, with products hitting retail in 2017. Henson's priority at BLE is to introduce the new IP to prospective partners and to snag a master toy deal. Henson will also have an eye towards community outreach programs that leverage the marine-education focus of the series.

Current partners BLE marks the market debut of Splash! No partners have yet been announced.

Open categories Categories being targeted by Henson include toys and games, consumer electronics, ELAs, infant/toddler products, apparel and accessories.



We Bare Bears

Property owner/licensor Cartoon Network

Synopsis Debuting in July, *We Bare Bears* is Cartoon Network Studios' newest original 13 x 11-minute animated comedy. It follows a trio of bear brothers and their hilariously awkward attempts to find their way in a world full of humans. The bears' everyday misadventures are portrayed with the sharp sense of humor that has become Cartoon Network's hallmark.

Licensing plans and launch The first phase of the program will feature apparel, accessories, toys and gifts. Products are expected at retail in 2017.

Current partners The IP was first unveiled at Licensing Expo in Las Vegas, and BLE will be the first opportunity potential EMEA partners will have to get a look at it. Licensee announcements are expected to follow BLE.

Open categories The roster is wide open heading into the event.



Sydney Sailboat

Property owner/licensor Essential Media & Entertainment, Ideate Media, Telegael, Raydar Media

Synopsis The 52 x 11-minute animated preschool series bowed in Australia in March and features best friends Sydney Sailboat and Zip the Water Taxi riding the waves of life alongside their fleet of friends in bustling Bubble Bath Bay. Each episode follows Sydney and his friends as they embark on exciting adventures while learning important lessons about teamwork, friendship, cooperation and problem-solving.

Licensing plans and launch The IP will debut to the licensing community at BLE. The initial focus will be on finding master toy, publishing and apparel licensees.

Current partners Grahame Grassby has signed on as Sydney's L&M agent in Australia, and HarperCollins (publishing) in Australia and New Zealand, and ABC Commercial (home entertainment) in Australia are also on-board.

Open categories Sydney's co-licensors will be looking to secure international broadcast partners as they build the IP before exploring other licensing categories.





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